



Get the financial advice you need

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Financial Planning

| Investments

| Insurance

| Retirement

| Wealth

Get the financial advice you need with **Principleo BlueStar**

We're committed to helping you reach your financial goals – whether you're planning for retirement, saving for a holiday, securing your child's future, or building your business.

Consulting an accredited financial adviser is essential to help you with some of the most important financial

decisions of your life – and at Principleo BlueStar, we offer you holistic advice to help you reach your financial goals, achieve sustainable wealth and gain peace of mind.

But what is it that sets a BlueStar business like ours apart?



A range of **financial expertise** under one roof

At Principeo BlueStar, you'll draw on the expertise of a team of financial specialists who can offer you personalised advice and a wide range of financial solutions – from financial planning and insurance to investment advice and retirement planning. We also offer short-term insurance with our partners MiWay and Santam. And if any of your financial needs can't be addressed by one of our advisers, we'll source an expert for you.

Continuity and **peace of mind**

As a Principeo BlueStar client, you'll be building a relationship with our team of financial advisers, rather than with a single adviser. And this means that you'll always deal with someone who understands your financial situation and goals and knows your long-term financial plan. This continuity, along with the knowledge that the financial advice we provide is backed by Sanlam, means you can rest assured that your finances are always in good hands.

Our commitment to you

We are qualified, passionate professionals that are committed about proving financial peace of mind thru creating and protecting wealth.

Our advisors are:

Transparent – You will always know exactly what you are receiving.

Confidential – Your privacy and security in financial matters are a priority to us so we pay detail attention to data and document security.

Logical & understandable – we focus on empowering you to make an informed decision.

Professional – we offer advice that are compliant with all industry related legislation.

How we operate

- We value confidentiality
- We always act with integrity.
- We always act with professionalism.
- We always put our client's interest first.
- We keep regular contact with our client.
- We are always up to date with new legislation and product information.

What we do

- We value long term, mutual beneficial relationships.
- We provide sustainable financial advice.
- We provide compliant financial advice.
- We manage our practice on sound business principals.





Products and Services:

We offer a comprehensive range of products and services to help you achieve your financial goals through each stage of your journey covering all your needs from personal income protection, short- and medium-term savings goals, retirement planning and the commercial needs of your business.



Insurance

Personal:

- Life Cover
- Disability Cover
- Severe Illness Cover
- Impairment Cover
- Accident Cover
- Income Protection
- Sickness Benefit
- Funeral Cover
- Business:**
- Key Person
- Buy and Sell
- Contingent liability

Short-term Insurance

- Property
 - Personal
 - Commercial / Business
- Household
- Agriculture
- Director's Liability
- Vehicle
- Liability
- Accident

Retirement

- Retirement Annuities
- Pension Funds
- Provident Funds
- Preservation Funds
- Living Annuities

Investments

- Tax-free investments
- Unit Trusts
- Various options on LISP (Linked Investments)
- ILLAs / ILLIs
- Endowments
- Preservation funds
- International / Offshore options
- Life Annuities
- Term Annuities
- Saving plans
- Short/Long term Investments
- Diversified investments – Glacier by Sanlam
- Collective Investments



Medical insurance

- Gap Cover
- Medical Aid (Bonitas / Fedhealth)

Employee Benefits

- Retirement funding

Estate Planning

- Wills

Loyalty Program

- Reality



Meet the team



Marianne Crause
Investment Specialist
RE1 / RE5 / THEO / IQA



Lurette Botha
Financial Planner
RE5 / Postgraduate diploma
financial planning/ IQA



Brett Mantle
Financial Planner
RE5 / National Certificate in Wealth
Management / Advanced Certificate
in Financial Planning



Jolandie Strydom
Investment Specialist
RE5 / BA Communications
/ BA(Hons) Psychology /
PostGrad Diploma Financial &
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Gerber Strydom
Investment Specialist
RE5 / PostGrad Diploma
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BCom(Hons) Financial Analysis



Mattie van Rooyen
Investment Specialist
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(Fine Arts) Unisa



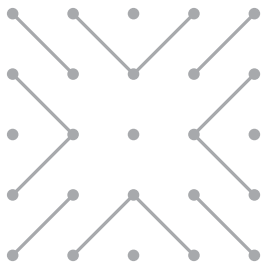
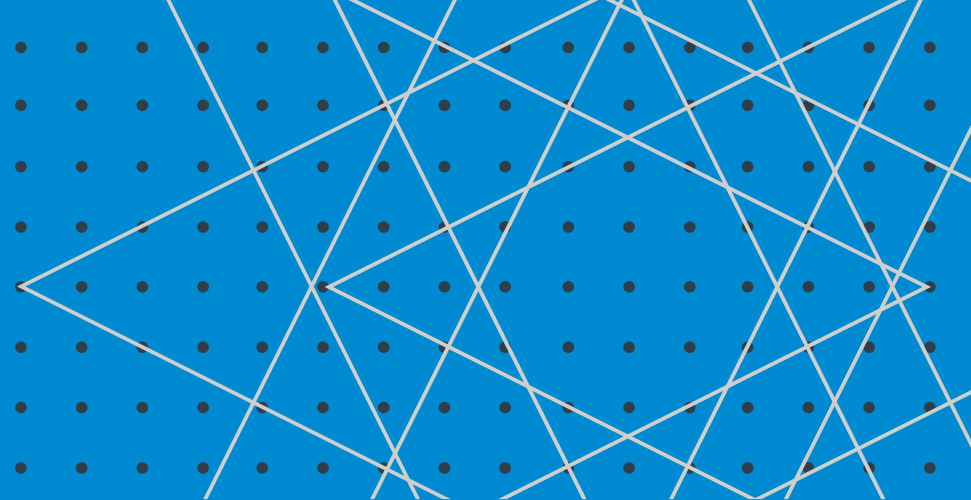
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