

A man with grey hair, wearing a dark blue suit, white shirt, and a teal tie, is sitting in a light-colored armchair. He is looking out of a large window to his left. The window has a decorative pattern of overlapping squares and diamonds in a light blue and white color scheme. The background outside the window is a blurred view of a modern building with glass and steel.

Prisma BlueStar

authorised by  **Sanlam**

Get the financial advice you need

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Financial Planning | Retirement | Insurance | Health | Investments | Wealth | Credit



Get the financial advice you need with **Prisma 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. At **Prisma 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 Prisma 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 Prisma 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 a committed team of specialist financial planners based in Durbanville, Western Cape. As our client you can always depend on our dedication to understand your specific needs and circumstances in order to compile a unique solution for you.

Our financial planners are authorised by Sanlam to advise you on a full range of financial solutions and will actively work with you to achieve financial independence and sustainable wealth.

Our advice and services are based on the following core values:

- **Integrity**
- **Transparency**
- **Respect**
- **Commitment**

We are always committed to doing the following in conjunction with you:

- **identifying shortcomings and areas for development in your financial plan;**
- **implementing suggestions and initiatives to limit your risks and add momentum to your personal wealth and**
- **proactive monitoring and actively managing the above.**



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

Risk Cover:

- Death and Disability (Temporarily and Permanent)
- Dread Disease
- Sickness Benefit

Business Insurance::

- Key Person insurance
- Buy and Sell insurance

Short-term Insurance

- Property
 - Personal
 - Commercial/ Business

Retirement

- Retirement Annuities
- Preservation Funds
- Savings Plans (Including Tax-free Savings Plans)
- Living Annuities and Guaranteed Life Annuities

Investments

- Collective Investments and Tax-free Saving Plans
- Education Planning
- Direct Share Portfolios



Employee Schemes

- Group Cover
- Pension and Provident Funds

Loyalty Program

- Reality

Estate Planning

- Wills
- Trusts Estate
- Estate Administration



Meet the team



Hugo Lambrechts
Senior Financial Planner
M.Comm



Danie Gerber (jnr)
Financial Planner
B Sc (US), Hons BB and A (US)



Hugo Lambrechts (jnr)
Certified Financial Planner
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