



Proficient
BlueStar

authorised by  **Sanlam**

Get the financial advice you need

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Financial Planning

| Investments

| Insurance

| Retirement

| Wealth

Get the financial advice you need with **Proficient 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 Proficient 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 Proficient 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 Proficient 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**

Our mission at Proficient BlueStar is to provide our clients with financial solutions and services that will bring meaningful changes to their lives. Based in Port Elizabeth, East London and Graaff-Reinet in the Eastern Cape, our financial planners specialise in a wide range of disciplines that include investments, financial planning, retirement and insurance.

We strive to build a relationship with our clients based on trust, proficiency, integrity and transparency which is part and parcel of Proficient BlueStar's mission statement. Through our financial insight, we will enable you to achieve the financial independence and sustainable wealth you deserve.





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

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
- Life Annuities
- Term Annuities
- Saving plans
- Short/Long term Investments
- Diversified investments – Glacier by Sanlam
- Collective Investments
- Shares



Medical insurance

- Medical Aid (Bonitas / Fedhealth)

Employee Benefits

- Retirement funding

Estate Planning

- Wills
- Trusts
- Guardian Trusts
- Beneficiary Fund
- Estate Administration
- Business Trusts

Loyalty Program

- Reality



Meet the team



Morne Barnard
Principal
Senior Financial Adviser
3 year Marketing Degree



Dawie Bester
Financial Adviser



Linda Knott-Craig
Financial Adviser



Wilma van Aswegen
Practice Manager
Financial Adviser
National Certificate: Wealth
Management



Monique Gouws
Paraplanner



Michelle van Jaarsveld
Administration Support



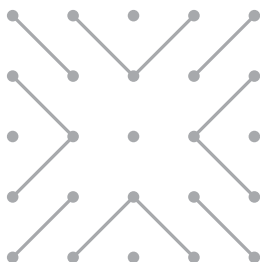
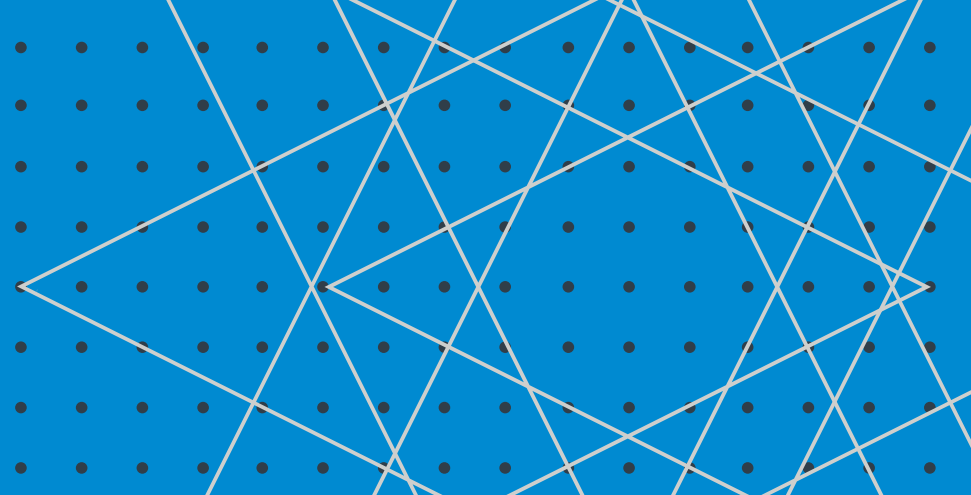
Lynn Moultrie
Client Services



Bongsi Ntsiba
Administration Assistant



Contact us



T Port Elizabeth 041 450 7000 **F** 041 364 0016
East London 043 741 1316 **F** 086 465 4784
Graaff-Reinet 049 892 3998 **F** 866750929

E clientservices@proficientbluestar.co.za (PE)
dawie@proficientbluestar.co.za (East London)
linda@proficientbluestar.co.za (Graaff-Reinet)

W www.proficientbluestar.co.za

 /BlueStar

