



San-Etos Wealth **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 **San-Etos Wealth 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 San-Etos Wealth 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 San-Etos Wealth 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 San-Etos Wealth 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 dedicated team of specialist financial planners who offer a range of complementary skills to help you achieve your financial goals. Based in Boksburg, Gauteng, we offer an extensive range of financial solutions that are customised to provide you, our client, with an optimal long-term plan towards financial independence. Your specific needs and circumstances will be treated confidentially and professionally and will be the focus when creating a solution that works for you. San-Etos Wealth is proud of our people and the way in which they contribute to your financial solutions. With more than four decades of experience in the financial services industry, we subscribe to and support our profession's codes of conduct.

Our team offers a range of complementary skills to help you achieve your goals.

We are:

Motivated - We provide fast, effective results and every individual is important to us.
Multi-skilled - You will receive a one stop service with holistic solutions. Resourceful - You will always receive alternative options that are unique and creative.
Pro-active - Our actions are timely and our choices well researched, to prevent costly consequences.

How we operate:

Transparent - You will know what you are receiving, how much it costs, and what difference it will make to your needs.
Specialised - We have experts concentrating in individual fields, to ensure that you receive advice of the highest quality.
Logical and understandable - We focus on empowering you to make an informed decision.
Ethical - As trusted advisers, we make sure that we meet with you on a regular basis. This ensures that all portfolios are revised regularly, so you can have peace of mind in knowing that your solution is up to date and relevant to your specific needs.

Our advice

Our advice is driven by your needs. We have a history of success that we have achieved through our knowledge of markets, products, and companies. We believe in giving you trusted advice, delivered with integrity.





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
- Vehicle
- Liability
- Household

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

Loyalty Program

- Reality

In association with our partners we can offer:

- Legal Advice



Meet the team



Pieter Botha
Snr Financial Planner
National Certificate in Wealth
Management



Johan Redelinghuys
Snr Financial Planner
National Certificate in
Wealth Management



Robert Whitecross
Snr Financial Planner
CFP



Matt Green
Financial Planner
Matric (Grade 12)
1st Level
Regulatory Exam for
Representatives (RE5)



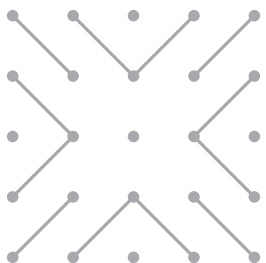
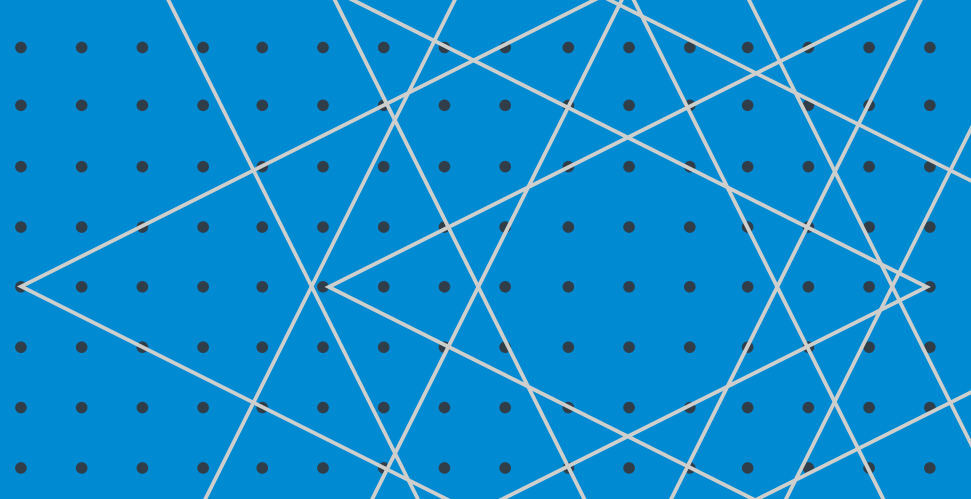
Sala Edwards
Financial Planner
National Certificate in Wealth
Management



Megan Rudolph
Financial Planner
Matric (Grade 12)
1st Level Regulatory Exam for
Representatives (RE5)



Contact us



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