



Get the financial advice you need

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Financial Planning

| Investments

| Insurance

| Retirement

| Wealth

Get the financial advice you need with **Sleewijk 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 Sleewijk 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 Sleewijk 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 Sleewijk 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 Bloemfontein, Free State. As our client, you can always depend on our dedication to understanding 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.

We specialise in Risk Management (Business and Life); Investments (Business and Personal); and Financial Planning. We are fully licensed in terms of the Financial Services Board (FSB) regulations. We are also members of the Financial Planning Institute (FPI), which means our advice complies with all legislative requirements and you can enjoy peace of mind.

Our clients expect an outstanding level of professionalism and someone who will listen to their requirements. Our primary goal is and always has been to exceed our clients' expectations. This is achieved by means of our knowledge of the financial markets, products, tried and tested planning processes, as well as continuous study and personal development. Our thorough knowledge enables us to create welfare and protect you and your family against the erosive effect of tax and inflation. Active and regular research in all markets ensures that you will receive appropriate advice. Our regular review of your situation ensures that your goals are met. A thorough record of all our interactions with you ensures that we can render a service with trust and accuracy. It ensures fast handling as well as timely and accurate feedback as regards all your enquiries. We believe in long-term relationships with our clients and are actively involved in the implementation of their financial management and planning.





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
- Engineering
- Vehicle
- Liability
- Accident
- Aviation
- Marine
- Household
- Agriculture
- Director's 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
- 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
- Business Trusts

Loyalty Program

- Reality

In association with our partners we can offer:

- Accounting and Tax Services
- Legal Advice



Meet the team



Helgard Truter (Jnr) CFP®
Owner/Senior Financial Adviser



Riaan Crowther CFP®
Owner/Senior Financial Adviser



Helgard Truter (Snr) CFP®
Senior Financial Adviser



Tinus Brits CFP®
Independent Financial Planner –
licenced by SFP

Administrative Staff



Jo-Anne Piek
Planning Specialist for
Helgard Truter Jnr



Deidré du Plessis
Administrative Manager for
Riaan Crowther



Christine van Deventer
Administrative Clerk for
Riaan Crowther



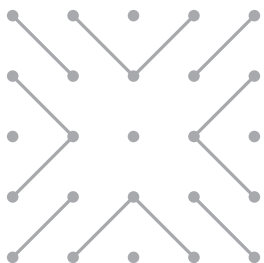
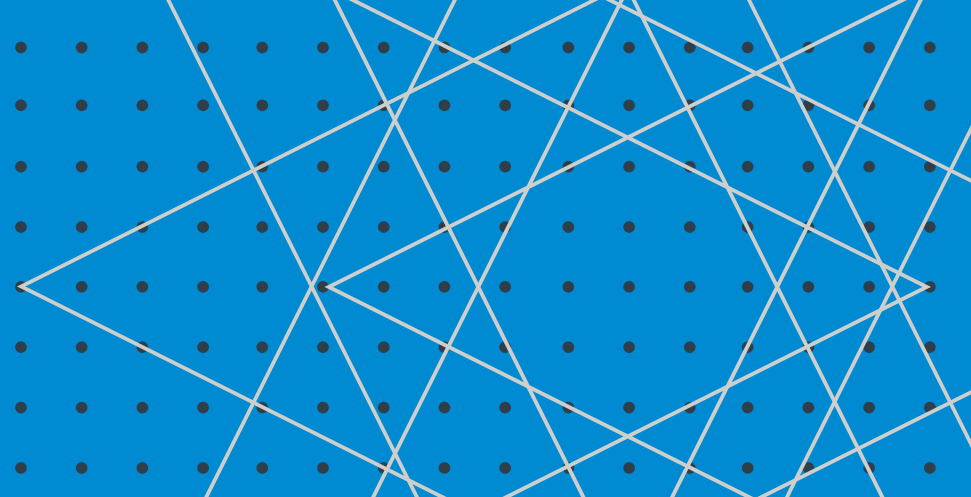
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