



Get the financial advice you need

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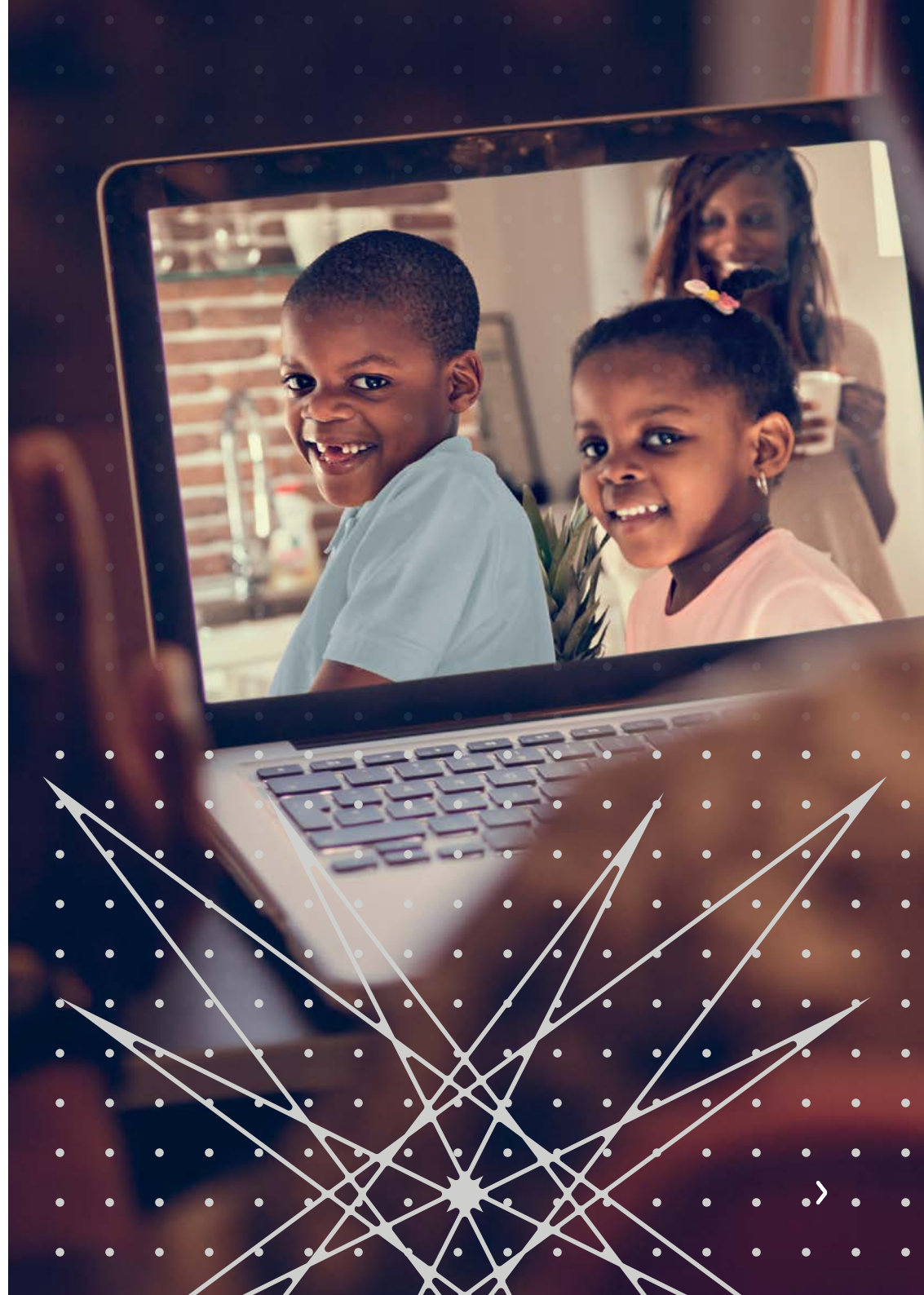
Get the financial advice you need with **Sperrylite BlueStar**

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 Sperrylite 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 Sperrylite 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 Sperrylite 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**

At Sperrylite BlueStar we are a family that builds your Legacy, securing your future through Family and Business Financial Planning Made Simple.

We seamlessly integrate your family and business finances, ensuring both thrive. Align your investments, and manage risk effectively, to achieve both personal and professional milestones.





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
- Engineering
- 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) - Referral

Employee Benefits

- Retirement funding

Estate Planning

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

Loyalty Program

- Reality

In association with our partners we can offer:

- Accounting and Tax Services
- Legal Advice



Meet the team



Elmien Lottering
Principal & Financial Planner
National Certificate in Wealth
Management



Elmarie Fraser
Financial Planner STI
Short-Term Insurance for
Personal and Commercial
Lines: NQF 4



Sanri Lottering
Financial Planner
BCom Economic Sciences
& Informatics



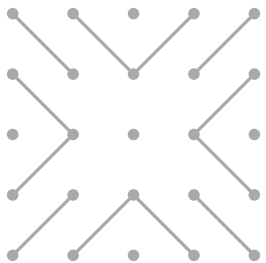
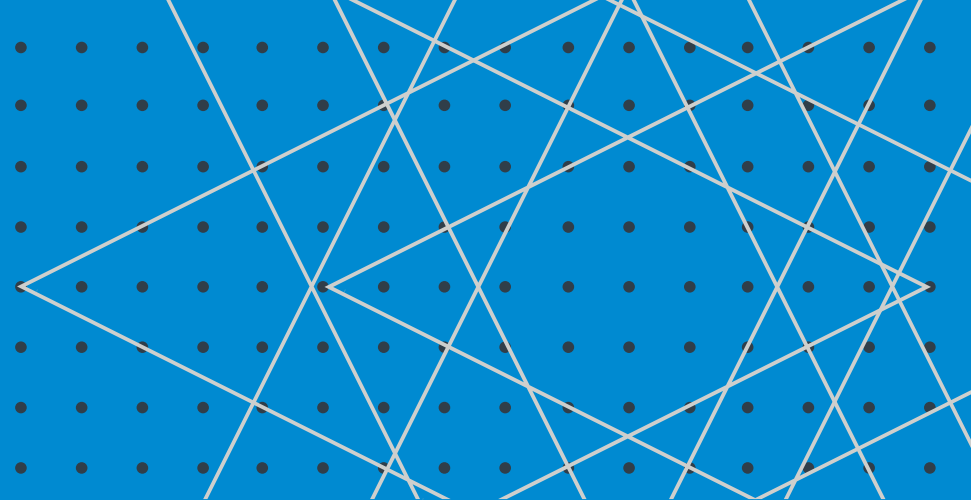
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