

Abstract geometric lines in a light beige color, forming a series of overlapping triangles and polygons, located on the left side of the image.

Surgency BlueStar

authorised by  Sanlam

Get the financial advice you need

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Get the financial advice you need with **Surgency 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 **Surgency 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 Surgency 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 a wide range of short-term insurance offerings through our partners. 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 Surgency 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

Purpose: Empowering our clients to achieve financial freedom and peace of mind through personalized and innovative financial planning solutions.

Vision: To emerge as the definitive leader within the Sanlam Group, setting the standard for excellence in financial empowerment and guidance, ensuring every client achieves a secure and prosperous future through Surgency BlueStar's tailored solutions.

Mission: At Surgency BlueStar our mission is to provide innovative and reliable financial solutions that empower our clients to achieve their financial confidence. We aim to accomplish this by prioritizing our clients' unique goals and aspirations, fostering lasting relationships built on trust, transparency and excellent customer service.





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 (in association)

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



Medical insurance (In association)

- Gap Cover
- Medical Aid (Bonitas / Fedhealth)

Employee Benefits

- Retirement funding and risk benefits

Estate Planning

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

Loyalty Program

- Reality



Meet the team



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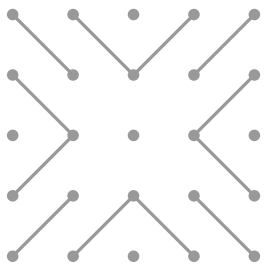
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