

Your financial partner – translating all your needs and expectations relating to financial security into an all-inclusive, personalised roadmap to independence.

Our service is based on the pillars of relationship-building, independence, integrity, empowerment and professionalism.

Professional experience

Trapezium BlueStar is a team of professionals with specialised knowledge and skills in the financial services industry. You, as our client, can always rely on service that is:

Researched	We actively and regularly research the investment, insurance and retirement markets to ensure that you are receiving applicable advice.
Transparent	You will know what you are receiving, the costs involved and the value you receive at all times.
Confidential	Your privacy and security in financial matters are paramount to us and no information will be disclosed without your written consent.
Specialised	Our team consists of experts specialising in their respective fields, ensuring you receive high-quality and accurate advice.

Relationship – our long-term commitment

Trapezium BlueStar believes in building a long-term relationship with clients to ensure the sustainability of the financial plans we have developed in partnership with you. We believe in spending time with you to understand the role of your existing policies and investments in terms of your particular needs and circumstances. This is matched with a unique and individually researched solution, providing you with a “roadmap” to financial security.

Building a relationship with us gives you access to our team of qualified advisers specialising in specific aspects of the financial services arena, backed by reliable administrative processes and support staff. You will receive the personal attention we know is so important when it comes to discussing and planning your financial future.

When you implement our recommendations, we will:

- ② ensure all requirements for implementation are done with limited impact on your schedule
- ② provide you with a simplified and up-to-date portfolio of all your provisions
- ② provide you with a personalised folder to keep a record of all financial documents. This will limit the loss of important documents and includes space for all related documents.

Continuing your relationship with us, you can rely on us to provide assistance regarding:

- ② the placement of funds or policies (we specialise in pension funds)
- ② regular portfolio updates and feedback
- ② reliable and friendly service any time you need it.

We cordially invite you to meet with us and learn what the various ideas and systems presented can do for your journey to financial independence. What you will experience and learn from us will work whether you are a salaried employee, a business owner, a professional or retiree wanting to secure the fruits of your labour. All that remains is for you to familiarise yourself with our service level agreement and then contact us so that we can begin your journey to financial security.

Our service offer

We commit to working with you to determine areas for development within your financial situation and to implement a number of practical initiatives to drive your finances successfully into the future.

This service offer acts as a symbol of commitment for all parties – that your financial plan will be proactively pursued and implemented as required.

The process that we apply when dealing with clients can be broken down into six basic steps:

1. Initial contact

We will contact you to arrange an interview.

2. Fact finding

During the interview, we will get to know each other, and we will answer your questions and collect all relevant data to prepare your plan. This will include your personal and professional goals and objectives.

3. Data analysis

Based on the data collected, we will identify all the issues relevant to your financial needs. We will assess and analyse each issue in order to formulate strategies to address your present needs and review all available options in order to attain your future dreams.

4. Recommendations

We will compile a presentation which will describe your current financial position.

This will include an analysis of your needs and goals. We will provide product recommendations to achieve your stated needs and goals and cover compliance-related matters. Included will be details on future reviews and ongoing monitoring.

5. Implementation

We will give you a written presentation where we explain the different aspects and answer any questions you might have. We will ensure that you are comfortable with the recommendations and get your consent to proceed with the implementation.

We will assist you with completing all the necessary paperwork, with client signatures and approvals, and lodge the applications with the relevant product providers on your behalf. You will be kept updated throughout on the progress of your application.

6. Review

We will meet with you on a yearly basis to review your financial plan. This is to ensure that it keeps in line with your changing needs.



Our products and services

 Assurance	 Insurance
Personal Assurance Life Assurance Trauma/Disability Assurance Income Replacement Assurance Key Person Assurance Term Assurance Bond Assurance Business Assurance Buy & Sell Assurance Key Person Assurance Surety Protector	(Association) Household Business Interruption Vehicle Property • Personal • Business
 Retirement Planning	 Investment Planning
Retirement Annuities Provident Funds Pension Funds Living Annuities Defined Benefits	Unit Trusts Shares Offshore Investments Linked Life Annuities
 Accounting and Tax	 Estate Planning
(Association)	Family Trusts Investment Trusts
 Employee Benefits	 Partnership Agreements
 Legal Advice	 ... and much more!
(Association)	

For more information do not hesitate to contact our office:

Benoni office:

Neels Myburgh & Theo Agenbag

Tel: 011 849-7318

E-mail: admin@trapeziumbluestar.co.za

Bredell office:

Phill Ryan & Dolf Jonker

Tel: 011 396-2335

E-mail: service@trapeziumbluestar.co.za

Ursula Marais

Cell: 083 303 1942

E-mail: umarais@sanlam4u.co.za