



Treasurers BlueStar

authorised by  **Sanlam**

Get the financial advice you need

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Financial Planning

| Investments

| Insurance

| Retirement

| Wealth

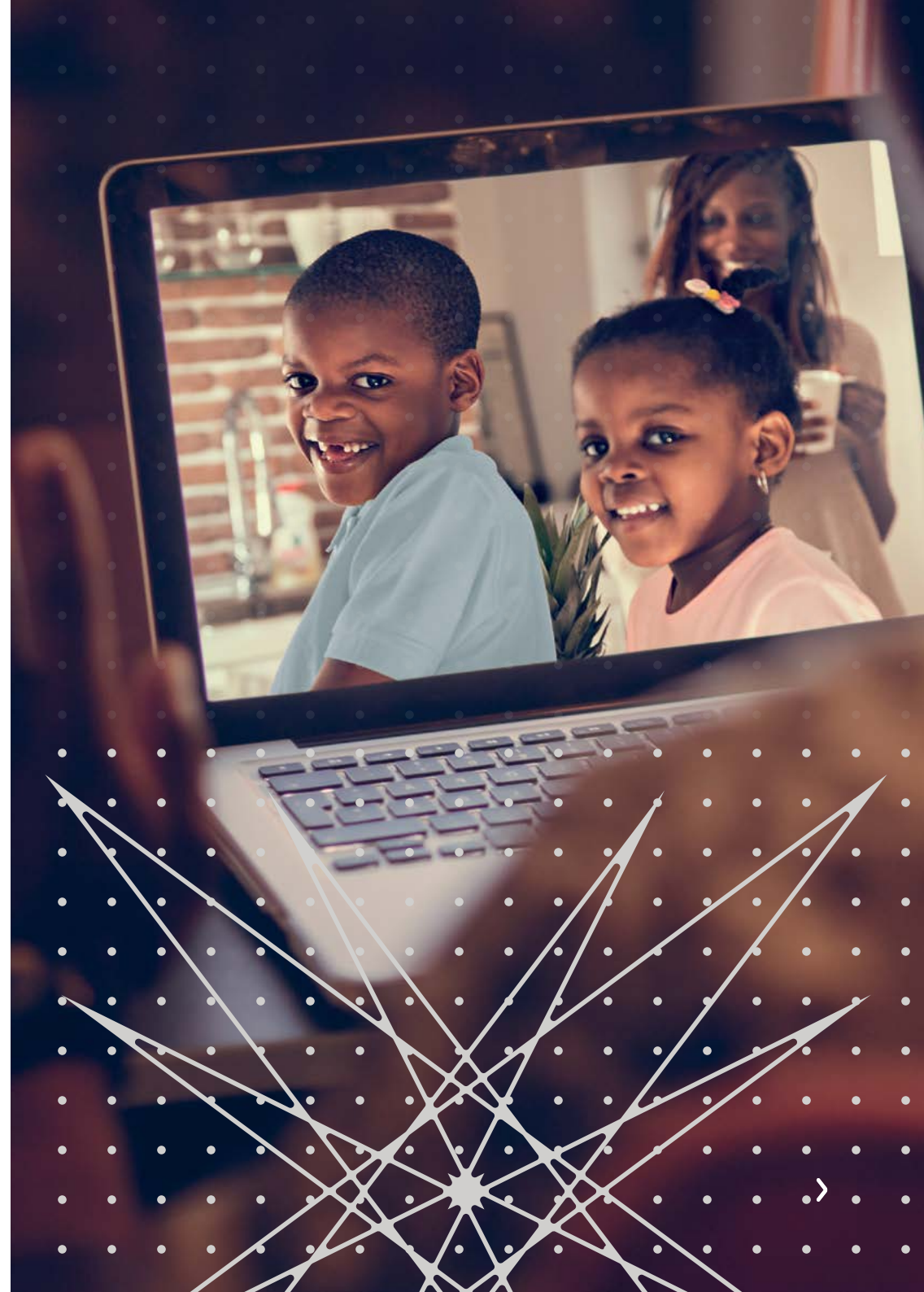
Get the financial advice you need with **Treasurers BlueStar**

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 Treasurers 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 Treasurers 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 Treasurers 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

Business purpose/vision

At Treasurers we strive to protect your biggest treasure being your ability to earn an income, protecting and growing your savings wealth, protecting, and growing your retirement wealth, protecting your ability to provide for your family.

We place your needs at the centre of our business and ensure that our dedicated team is there when you need us most.

We strive to provide relevant financial advice through our qualified financial advisors with emphasis on professionalism and excellent customer service.

The support provided through our back-office team is the best, enabling our financial advisors to do what they do best and to provide you with peace of mind.

Professional Experience

Treasurers is a team of professionals with specialised knowledge and skills in the financial services industry. We have handpicked our advisors to ensure that our team is as diverse as our client are and that they can meet you at your expected level of expertise and service.

As our client, you can always rely on service that is:

- Trusted
- Crystal Clear
- Knowledgeable
- Treated with confidentiality

Trust – Our long-term commitment

Building a relationship of trust with you provides you with access to our team of qualified advisers specialising in individual aspects of the financial services arena, backed by reliable administrative processes and support staff.

When you accept and implement our solutions, we will:

- ensure that all implementation requirements are met with limited impact on your schedule
- provide you with a simplified and up-to-date portfolio of all your provisions
- Be here for any advice needed as your life grows with your finances and family.

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

- Relevant information to enable you to make informed decisions
- Tailor made portfolio updates and feedback as per client agreement
- Reliable and friendly service
- Regular informative emails ensuring you are knowledgeable regarding your portfolio.





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
- Guardian Trusts
- Trusts
- Estate Administration

Loyalty Program

- Reality

In association with our partners we can offer:

- Accounting and Tax Services
- Legal Advice



Meet the team



Liza Swanepoel
Bluestar Principal and Financial Adviser,
Investment Specialist, Tax Practitioner,
Chartered Accountant (S.A.)
CTA; Honors in Accounting; BCom Accounting;
SAICA Board Exams,
Certified Financial Planner



Bianca Muller
Financial Adviser



Christa Joubert
Senior Administrative Assistant



Ntombikayise Majola
Sales Consultant



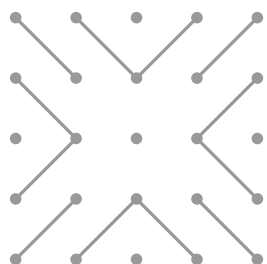
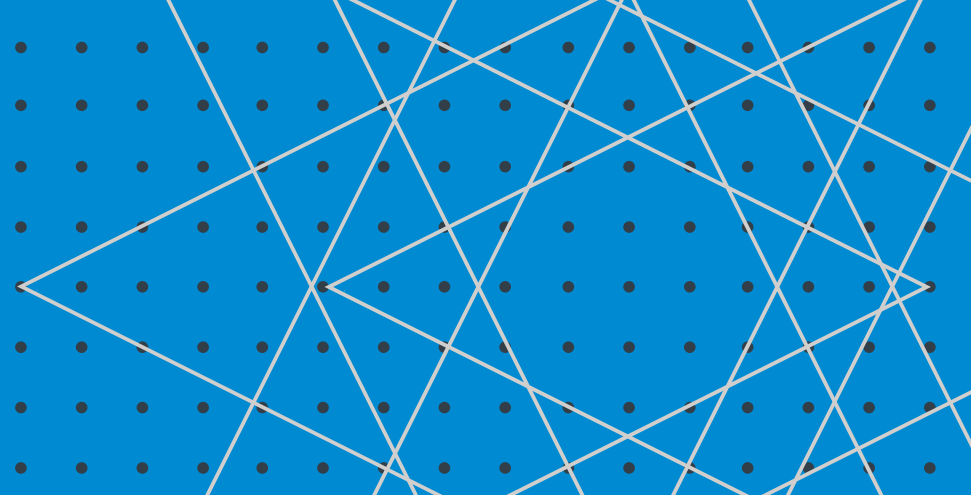
Chenay Nicholls
Junior Administrative Assistant



Patricia Ndlovu
Filling Clerk



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