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Get the financial advice you need

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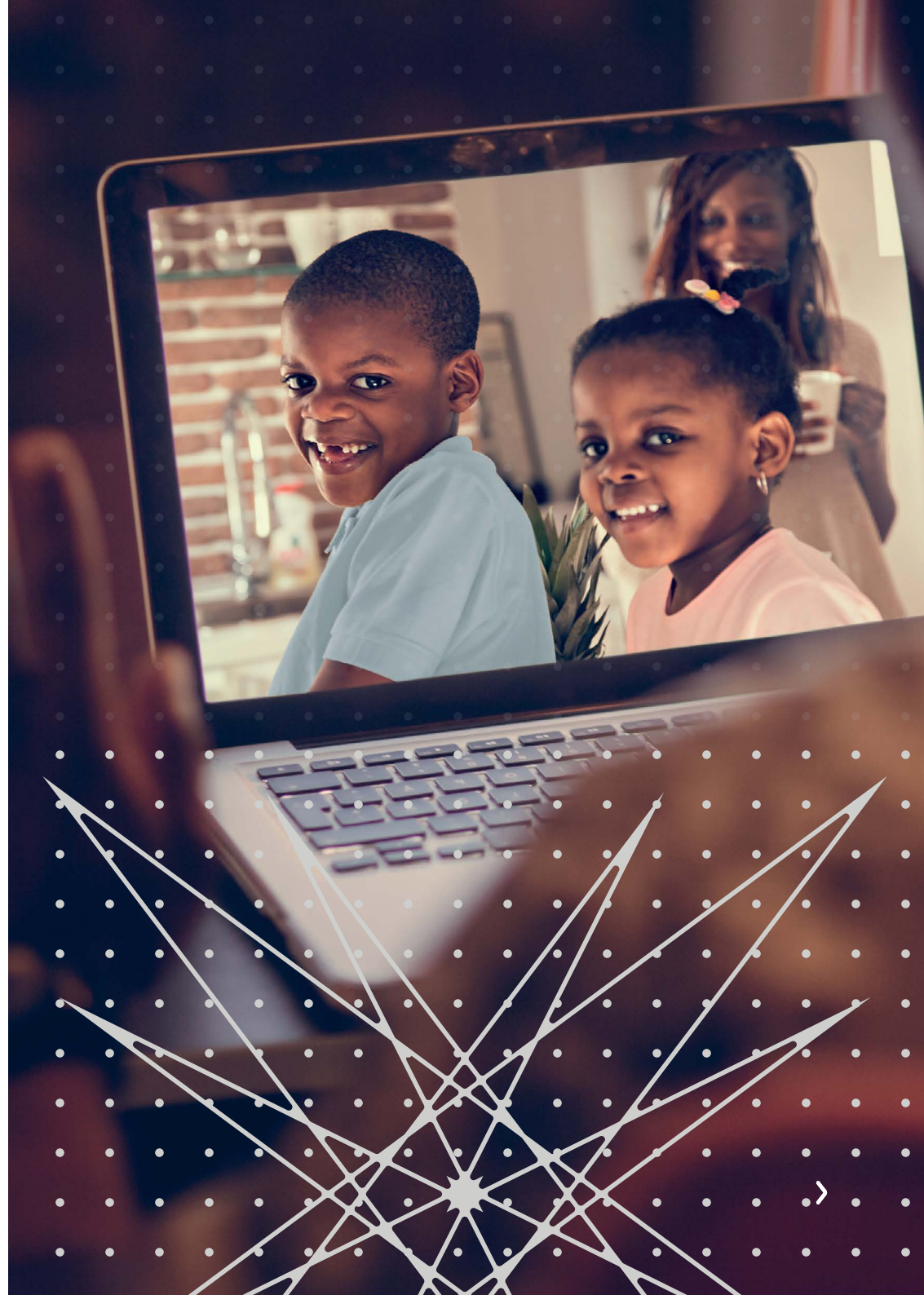
Get the financial advice you need with **U-Voor BlueStar**

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 U-Voor 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 U-Voor 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 U-Voor 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**

U-Voor Bluestar focuses on high-net-worth Individuals by setting up total planned solutions and providing the total services. Our Head Office is in Lichtenburg, but we also operate offices from Mahikeng. The company is led by Adriaan Kriel.

Making a difference is one of the important aspects to consistently increase our clients' financial knowledge. U-Voor Bluestar also drives innovation and now does its own Short-term insurance underwriting. Further ways to improve customer experience will be sought. The passion and drive to succeed and goodwill have developed over the past five years. The company has 2 Investment Specialists and 3 Short-term Advisors.

The administration staff are highly trained and provide exceptional service. The BlueStar is nimble and could turn shortcomings into opportunities for better business. We want to make a difference in our clients' lives.





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
- Shares



Medical insurance

- Gap Cover
- Medical Aid (Fedhealth)

Employee Benefits

- Retirement funding

Estate Planning

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

Loyalty Program

- Reality

In association with our partners we can offer:

- Legal Advice



Meet the team



Adriaan Kriel

Principal
National Senior Certificate
Matric (Grade 12)
Master of Business Administration
B.Com. (Law)
B.Legum
1st Level Regulatory Exam for
Representatives (RE5)
Experience in Financial Services
Industry: 14 years
International Quality Awards: 9



Willmine Lewis

Senior Financial Planner
National Senior Certificate (Matric – Grade 12)
Diploma in Marketing, Postgraduate Diploma in Financial Planning
Postgraduate Diploma in Estate Planning
1st Level Regulatory Exam for Representatives (RE5)
FPI Membership
Certified Financial Planner® professional
Council of Medical Schemes
Accreditation Number BR24841
Expiry Date 2028-05-26
Experience in Financial Services Industry: 25 years
International Quality Awards: 20



Meet the team



Annika Visser

Short term Adviser

National Senior Certificate (Matric – Grade 12)

Higher Certificate in Short-term Insurance

Regulatory Examination: Representatives in all
categories of FSP's (RE5)

Regulatory Examination: FSP's and Key Individuals in
all categories of FSP's (RE1)



Sanet Roodt

Short term Adviser

National Senior Certificate (Matric – Grade 12)

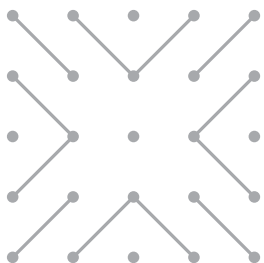
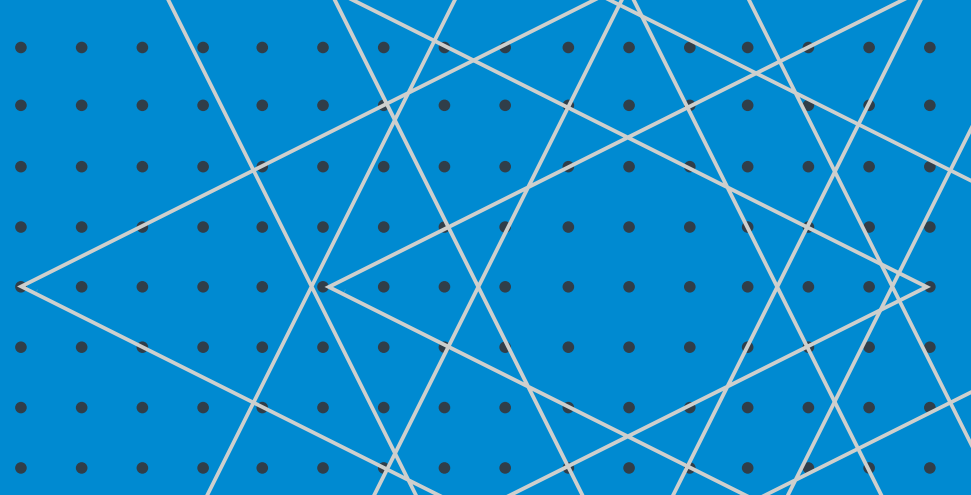
1st Level Regulatory Exam for

Representatives (RE5)

Experience in Shortterm insurance: 5 years



Contact us



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