

## Our Client Value Proposition

### **Get the financial advice you need**

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. BlueStar Businesses provides client-oriented financial advice. We offer you holistic advice to help you reach your financial goals, achieve sustainable wealth and gain peace of mind. These Businesses strive to build a financial future and legacy for you and future generations.

### **Continuity and peace of mind**

As a 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.

### **A range of financial expertise under one roof**

At 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. Practices with Certified Financial Planners, you can rely on trusted, practical alternatives that will enable you to make well-informed financial decisions.



# Meet the team

**Winelands BlueStar** evokes the rich heritage and beauty of the Winelands region, known for its lush vineyards and breathtaking landscapes. Just as the Winelands produce world-class wines through dedication, precision, and a deep understanding of the land, we are committed to cultivating your financial success with the same level of care and expertise.

At Winelands BlueStar we bring together the finest financial minds to create tailored solutions that meet your unique needs, ensuring your financial future is as robust as the vineyards of the Winelands.

**Winelands  
BlueStar**

authorised by  **Sanlam**



**André Wethmar** is a senior financial planner and started his career at Sanlam in February 2012.

He is passionate about tax and investment planning, and his main goal is to help you make well-informed decisions on what types of investments are suitable for you considering tax. André is firmly committed to long-term client relationships and, through financial planning, helps his clients with retirement, tax, estate & insurance planning strategies.

André holds a BCom degree, Postgraduate Diploma in Financial Planning from the University of Stellenbosch and a Postgraduate Diploma in Investment Planning from the University of Free State.

**He is a member of the following professional bodies:**

- Financial Planning Institute of South Africa, where he is a licenced CFP® professional
- South African Institute for Tax Practitioners, where he is a registered General Tax Practitioner (SA)<sup>TM</sup>
- Council of Medical Scheme, registered medical scheme broker



**Alto de Kock** has been in the financial services industry since 2015. If he's not giving professional advice to his clients, you will find him either on his bicycle in the mountains or in the ocean on his surfboard. He is passionate about people pushing themselves to the best they can possibly be, financially and physically. He enjoys cultivating long-term business relationships and seeing his clients grow with him.

Alto has a Bachelor of Commerce (business) from the University of Stellenbosch. He also holds a Postgraduate in Financial Planning attained from the University of Stellenbosch Business School and a Postgraduate in Investment Planning at the University of the Free State. Alto is also a registered CFP® professional.



**ConradiePrisma BlueStar** is situated in Durbanville, and provides specialised financial planning, insurance, retirement and investment services to individuals and businesses.

Our team consists of a number of financial planners who specialise in different financial disciplines, which allows us to provide our clients with a greater depth of knowledge, servicing all financial needs and requirements from a single location. This customised approach takes into consideration the complexity and uniqueness of each client's position, so you can rest assured that your specific financial needs will be catered for.

**ConradiePrisma  
BlueStar**

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**Hugo Lambrechts** is an accredited Sanlam financial adviser at ConradiePrisma BlueStar in Durbanville, Western Cape. When working with clients, he goes above and beyond to make sure they achieve financial independence and sustainable wealth. Please feel free to contact him, should you need assistance with your personal financial plan.

Hugo has a M.Comm from the University of Stellenbosch

**Infineo BlueStar** comprises a team of experienced financial specialists who make time to understand your specific requirements and circumstances, and to draw up a financial plan that suits your unique position.

We serve our clients from Somerset West, and our advice and solutions are based on comprehensive and fully compliant financial planning. We are committed to developing long-term relationships to deliver a superior client experience, which is based on solid administration and support processes.

**Infineo  
BlueStar**

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**Pieter Vermeulen**

Certified Financial Planner®

National Certificate: Financial Markets and Instruments

For the last 30 years I provided clients with financial advice on a personal level through comprehensive financial planning.

Client-centric advice is given considering all forms of taxation both domestically & abroad. Advice is based on considering customer needs in the short term as well as the long term.

