



THE POWER
OF INDEPENDENT ADVICE

PARTICIPATE & YOU CAN WIN A CASH PRIZE R10 000!

In a very competitive financial services environment clients have come to expect exceptional service levels and investment solutions. Although multiple similarities exist between companies operating in the private client wealth management sector, each business tries to differentiate themselves and their solutions from their competitors.

Brenthurst Wealth spends a considerable amount of time and resources, researching global investment trends and performing in-depth due diligence in order to identify investment opportunities and matching this to our clients objectives and risk profile. We pride ourselves in conducting independent research and tailor made solutions in order to provide superior long-term outcomes for our clients on an ongoing basis.

The esteemed research and publishing company **Intellidex**, will publish it's annual research report regarding your experience with your private bank and wealth manager in June. The survey is conducted in three parts - by industry professionals, the Intellidex team and by the clients of each respective wealth manager. All answers will be treated with the strictest confidence.

BRENTHURST WEALTH greatly appreciates your participation in the client survey again, which is presented in association with INVESTORS MONTHLY, a specialist investment publication of the respected business publication, FINANCIAL MAIL.

PARTICIPATE IN THE 2019 ON-LINE SURVEY AND STAND A CHANCE TO WIN R10 000! IN ADDITION, BRENTHURST CLIENTS STAND A CHANCE TO WIN A TWO DAY UNIQUE GETAWAY, VAL DE VIE - POLO VILLAGE, WESTERN CAPE.

You will be entered automatically for the draw for R10 000 once you have completed the survey. To enter for the Brenthurst GETAWAY EXPERIENCE all you must do is complete the survey and once completed take a screenshot of the page stating that you are done and forward to your advisor as confirmation of your participation. Winners of the Brenthurst draw and the R10 000 prize will be announced in late June.

To participate and share your rating of Brenthurst Wealth, CLICK HERE:

<https://www.research.net/r/winR10000>

The survey is managed on-line and only requires a few minutes of your time. We appreciate your time and THANK YOU in advance for your participation.

DEADLINE FOR PARTICIPATION IS 16 MAY 2019.

BRENTHURST WEALTH WAS RANKED AS THE BEST BOUTIQUE WEALTH MANAGER IN SOUTH AFRICA IN 2017 AND AS THE RUNNER-UP IN 2018.

Please do not hesitate to discuss your investment strategy with any of our highly qualified financial planners.



WHY CHOOSE US

Brenthurst Wealth is considered one of the leaders in the financial planning industry in South Africa. The company was founded in 2004 and has an established track record of exceptional service to clients and maintains a high client retention rate.

Brenthurst has a predominately high net worth client base consisting of individuals, companies and trusts and provides comprehensive financial planning solutions, which include investment and retirement planning, tax planning, direct offshore investment, risk planning, wills and estate planning.

1. AWARDS

Brenthurst was announced as **SA'S TOP BOUTIQUE WEALTH MANAGER** in the 2017 Intellidex Wealth Manager and Private Bank Award and ranked runner-up in 2018. This award recognizes excellence in financial planning. The company was also ranked as one of the **TOP FIVE WEALTH MANAGER OVER-ALL**, which included the larger well-established private banks and corporate financial services companies. BWM was also winner of **EXCELLENCE IN DATA MANAGEMENT (WINNER)** category in the International Adviser Award in 2017.

2. PROFESSIONAL

Brenthurst was one of the first companies to receive the **FPI Approved Professional Practice™** accreditation. This is a premier accolade and a recognition that BWM subscribes to the highest levels of professionalism. This accreditation also confirms that the company financial planning practice and compliance management is of the highest standards and ethics.

3. CERTIFIED

Brenthurst's team consists of fourteen highly-qualified investment advisors, eight of whom are Certified Financial Planner® Professionals providing independent investment advice on an individual basis. Having a detailed financial plan provides you with a strategy to make practical financial decisions in all aspects of your life. Brenthurst's financial planner will guide you through the various financial decisions providing certainty regarding your financial future.

4. INDEPENDENT

Brenthurst is totally independent and therefore not obliged to invest with any specific investment providers. Contact the Brenthurst team now and discover how an actively managed investment portfolio can create and maintain wealth over the long term.

5. EXPERIENCE

Brenthurst was founded in 2004 and has an established track record of exceptional service to clients. BWM maintains a high client retention rate by providing independent investment advice and focussing on building long term relationships. Our philosophy of searching for the best investment options contributed to Brenthurst receiving accolades.

6. NATIONWIDE

Brenthurst expanded its national footprint by opening additional offices in the Western Cape viz. Stellenbosch and Newlands. The company's international office in Mauritius was opened in 2018, offering investment opportunities to clients as well as assisting in residency, setting up company trusts, registration and administration.



BRENTHURST NOW IN MAURITIUS

In January 2018 Brenthurst opened an office in Mauritius to service our growing global client base in the setting up of trusts, foundations, companies and also in the buying of property in order to obtain residency.

BRENTHURST CURRENTLY ASSIST CLIENTS TO SET UP AND APPLY FOR THE FOLLOWING:

- ✓ Residency and work permits.
- ✓ Company and trust structures and setup.
- ✓ Appointment of trustees and directors and registered offices.
- ✓ Administration of companies, payroll and statutory returns
- ✓ Commercial and residential Investment property
- ✓ Foreign exchange transfers and tax clearance as well as opening of Mauritius bank accounts

For more information contact: **GAVIN BUTCHART**
gavinb@brenthurstwealth.co.za

BRENTHURST OFFERS A FULL FOREX SERVICE

BWM FOREIGN EXCHANGE CONSULTANT WILL ASSIST YOU WITH THE FOLLOWING SERVICES:

- ✓ Opening of private savings accounts for forex trading purposes
- ✓ Applying for tax-clearance certificates online
- ✓ Administration with regards to forex booking at trading
- ✓ Securing a highly competitive rate

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BRENTHURST OFFERS A COMPREHENSIVE RISK SERVICE

This is an independent broking service for all long term insurance needs and risk cover, notably personal life insurance and cover for dread disease and disability. This is an important component of any comprehensive financial plan.

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SPEAK TO ANY OF OUR OFFICES COUNTRYWIDE TO ASSIST WITH YOUR INVESTMENT STRATEGY

BRENTHURST SERVICE OFFERING INCLUDES:

**INVESTMENT PLANNING
RETIREMENT PLANNING**

**OFFSHORE INVESTMENTS
TAX PLANNING**

**WILLS & ESTATE PLANNING
LIFE INSURANCE**

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