BRENTHURST WEALTH MANAGEMENT
Personal Share Portfolios

BRENTHURST
THE HOME OF WEALTH

INTRODUCTION

Brenthurst Wealth, SA's Top Rated Boutique Wealth Manager has partnered with experienced investments managers, Sharenet Investments, to create powerful low-cost Share Portfolios.

We simplify Share Portfolios combining it with wealth planning and a proposal showing comparative fees, yields (integral for income needs), tax liabilities, restructuring and an implementation plan.

PORTFOLIO OPTIONS

LOCAL ACTIVE EQUITY TOP 25 PORTFOLIO
Direct exposure to top local shares listed on the Johannesburg Stock Exchange.

GLOBAL ACTIVE EQUITY TOP 25 PORTFOLIO
Direct exposure to some of the largest and most well-known companies globally.

GLOBAL PASSIVE BALANCED ETF PORTFOLIO
Low-cost balanced ETF portfolio in markets outside of South Africa.

PERSONALIZED PORTFOLIO
A combination of the above can be included in a blend. Where applicable we can also cater for an investor's specific requirements.

OR consider adding a few of your favorite shares to the mix with a non-managed account.

PLATFORMS

Personal Share Portfolios are managed on the award-winning **SAXO DMA Platform**. Investors can invest directly on this platform.

Personal Share Portfolios are also offered in products linked to SAXO and available on:

- **Glacier**
- **Momentum Wealth**

This includes discretionary investments like endowments or non-discretionary investments like retirement annuities.

THE BENEFITS

Own Your Shares
Investing in Unit Trusts means you invest or buy units in that fund rather than owning underlying shares or an actual percentage of the listed companies. With Personal Share Portfolios, you legally own the underlying shares in that company, in your own name.

A Personal Share Portfolio holds many benefits such as removing layers of fees. They can also easily be moved to a different trading platform, a move which does not trigger tax nor trading costs. These portfolios are actively managed and each focus on creating low-cost exposure to areas of growth within either local or international markets. Brenthurst can conduct in-depth analysis of a client's investments and prepare an individually tailored document for the client where the benefits of the Personal Share Portfolio are conveyed.

Contact Brenthurst today for a free assessment.

Transparent
Using the world class Trading Platform of SAXO DMA allows you to monitor your portfolio in real-time using online access. This access is granted to the investor as well as the Adviser; significantly improving service, information flow, reporting and record keeping. Full access to detailed statements and portfolio history allows for absolute transparency and firm control on all fees and movements.

Integration
Your adviser has continuous, full access to all information, including the Portfolio Manager of your portfolio, removing any potential mismatch between the initial portfolio objective and implemented strategy. The Adviser's continuous wealth planning process is also seamlessly integrated with the Share Portfolio management process, giving the investor peace of mind. Integration benefits include complete look-through exposure to the currencies, asset classes, sectors and geographies used in your strategy.

CREATING WEALTH
WITHOUT BORDERS

GET MORE FOR LESS

Cost

We pride ourselves on the highest level of service delivery and feel confident that this alone is enough, but as specialist wealth planners we are focussed on good financial stewardship and as a rule we combat fees and potential tax on our clients' behalf in order to maximise the value of the client investment through stable growth over time. Fees can eat away at the portfolio's value, which gets compounded over time.

Working closely with our Personal Share Portfolio Team we have managed to consistently lower the costs of investing, not only improving fees relative to other providers but also offer attractive fees in absolute terms. We therefore ensure clients seeking to utilise our Share Portfolio offering, pay no fees to transfer their existing portfolios and because no transactions take place, clients can rest assured that no Capital Gain Liability will arise due to the move.

Our friendly administrative team, together with your Adviser will help you through every step of the process, resulting in a simple, direct Share Portfolio, expertly managed with no complicated layered fees or opaque monthly reporting.

Efficiency

Open a local and/or offshore account at NO COST, using only one platform. Use one point of contact for every step of the process, from completing the needs analysis and application with your Adviser to opening the accounts (incl. all FX applications and approval if required for Offshore Accounts) right up to safely investing your nest egg in expert hands.

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