



THE POWER
OF INDEPENDENT ADVICE

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BRENTHURST RANKED
TOP BOUTIQUE WEALTH
MANAGER IN SA, 2017

intellidex
Top Private Banks &
Wealth Managers

BRENTHURST VOTED TOP WEALTH MANAGER IN SA

By Brian Butchart - Managing Director, Brenthurst Wealth Management

BRENTHURST WEALTH WAS VOTED TOP BOUTIQUE WEALTH MANAGER IN THE COUNTRY IN THE 2017 INTELLIDEX WEALTH MANAGER AND PRIVATE BANKS SURVEY. In addition, Brenthurst ranked fifth in the overall award for all participants, which included the larger well-established private banks and corporate financial services companies.

TOP WEALTH MANAGEMENT BOUTIQUE

INSTITUTION	RANK	OUT OF 10 (WEIGHTED)
BRENTHURST WEALTH MANAGEMENT	1	7.44
GRADIDGE-MAHURA INVESTMENTS	2	7.07
NFB FINANCIAL SERVICES	3	6.83
VERSO WEALTH	4	6.03

Brenthurst Wealth Management secures first position among the boutique wealth managers, with a solid performance in the wealthy executive and lump-sum archetypes.

This is an exceptional achievement and we are proud that our approach to independent advice and building long term relationships with clients received this recognition.

TOP WEALTH MANAGER: OVERALL WINNERS

INSTITUTION	RANK	OUT OF 10 (WEIGHTED)
STANDARD BANK PRIVATE BANKING/WEALTH & INVESTMENT	1	9.36
SANLAM PRIVATE WEALTH	2	9.19
NEDBANK PRIVATE WEALTH	3	8.94
PSG WEALTH	4	8.41
BRENTHURST WEALTH MANAGEMENT	5	7.44

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INTELLIDEX, SPECIALIST FINANCIAL SERVICES RESEARCH HOUSE

THE TOP PRIVATE BANKS AND WEALTH MANAGERS AWARD IS RESEARCHED BY INTELLIDEX, A SPECIALIST FINANCIAL SERVICES RESEARCH AND MEDIA HOUSE. THIS IS THE SIXTH YEAR INTELLIDEX HAS UNDERTAKEN THIS SURVEY, WHICH THEY DEVELOPED, TO ENSURE THE SURVEY BEST REFLECTS THE DYNAMICS OF THE WEALTH MANAGEMENT INDUSTRY.

The entries are adjudicated by an expert panel of industry professionals as selected by Intellidex. Prem Govender, respected member of the financial planning community in SA and former board member of the Financial Planning Institute (FPI) was amongst the judges. The panel also included financial analyst Orin Tambo.

intellidex[®]
Top Private Banks &
Wealth Managers

THE RESEARCH PROCESS HAS TWO MAIN ELEMENTS

THE FIRST IS A COMPREHENSIVE QUESTIONNAIRE COMPLETED BY EACH RESPECTIVE COMPANY.

This consists of a detailed questionnaire designed to analyse the decision-making processes and their costs, and obtain details about staffing levels, offices and the size of the business. **It analyses the service offering capabilities, expertise, compliance and IT functionality, consumer education and social platform and media exposure. It also aims to probe the processes, product offering and client solutions.**

The survey aims to analyse the service offering by posing 5 typical client case studies or archetypes which requires the financial planning team to develop a financial service proposal and solution for each case study. The intention is to identify what areas each business specialises in as well as their own capabilities.

The FIVE financial proposals and solutions Brenthurst had to prepare: the passive lump sum investor, the up-and-coming professional, the successful entrepreneur, the wealthy executive and the internationally wealthy family.

The financial planning team at Brenthurst prepared a solution for each of the above case studies and fared very well across the board. (please refer to results page 3)



THE PROUD BRENTHURST WEALTH TEAM

MAGS HEYSTEK • SONIA DU PLESSIS • BRIAN BUTCHART • DALEEN VAN WYK

BRENTHURST WEALTH MANAGEMENT ARCHETYPE RESULTS

These results reflect the judges' scoring, based on the assessment of the response for each archetype proposal and solutions submitted by Brenthurst with client response.

ARCHETYPE	SCORE (OUT OF 10)
LUMP-SUM INVESTOR	8.00
UP-AND-COMING PROFESSIONAL	7.33
SUCCESSFUL ENTREPRENEUR	7.00
WEALTHY EXECUTIVE	8.17
INTERNATIONAL WEALTHY FAMILY	7.17



THE SECOND ELEMENT IS THE ONLINE CLIENT SURVEY FROM WHICH THE PEOPLE'S CHOICE AWARD IS DETERMINED.

The questions posed to clients were wide-ranging designed to assess strengths and weaknesses of both private banks and wealth managers. The main areas of focus are on satisfaction levels with products and services, and whether clients believe they are getting value for money, for fees charged. There were also questions relating to why clients use private banks and wealth managers and whether their specific needs are being met. Clients were also given the opportunity to add their own comments on aspects not covered in the questionnaire.

Brenthurst ranked 4th in the country for the People's choice award amongst the Top wealth managers in the country and the results were very close.

PEOPLES CHOICE AWARD FOR TOP WEALTH MANAGERS, 2017

RANK	FIRM	OVERALL SATISFACTION LEVEL (OUT OF 5)	LIKELIHOOD OF REFERRAL (OUT OF 5)	WEIGHTED SCORE (OUT OF 5)
1	VERSO WEALTH	4.63	4.63	4.63
2	NFB FINANCIAL SERVICE	4.61	4.61	4.61
3	PSG WEALTH	4.57	4.58	4.57
4	BRENTHURST WEALTH MANAGEMENT	4.50	4.54	4.52
5	STANDARD BANK WEALTH & INVESTMENT	4.55	4.44	4.49



THIS IS AN EXCEPTIONAL ACHIEVEMENT AND WE ARE PROUD THAT OUR APPROACH TO INDEPENDENT ADVICE AND BUILDING LONG TERM RELATIONSHIPS WITH CLIENTS RECEIVED THIS RECOGNITION.

The investment environment, locally and globally, is more challenging than ever. In addition the industry is highly competitive and highly regulated – in the interest of clients – requiring the financial services industry to be exceptionally vigilant in its approach to wealth management.

Against this background we are especially pleased about our ranking in the client survey section of the award. A record number of clients of wealth managers and private banks participated in the survey this year. A total of 3600 respondents completed the client questionnaire, significantly up from the 2700 of the previous year.

Despite the demanding market environment and while operating in a highly competitive environment, we have experienced a period of strong growth in the past four years mainly as a result of our very active drive in consumer education offering regular seminars, newsletters, radio broadcasts and media publications which our clients and the investing public value in high regard.

But it is you, our clients who are at the heart of our business, many of whom we have known for many years and built strong trusting relationships with.

WE WANT TO THANK EVERY ONE OF YOU FOR YOUR LOYALTY AND CONFIDENCE YOU HAVE INSTILLED IN US. WE WILL CONTINUE TO STRIVE FOR BETTER AND MAINTAIN THE HIGH STANDARDS YOU DEMAND AND DESERVE.

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

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