



THE POWER
OF INDEPENDENT ADVICE

IN THIS ISSUE

CONSISTENT EXCELLENCE SETS US APART

Sonia Du Plessis, head of our Stellenbosch office, was voted **TOP FINANCIAL ADVISOR IN SA**.

Brenthurst ranked **TOP BOUTIQUE WEALTH MANAGER** in SA 2017, runner up in 2018 and in the **TOP 4** in 2019.

FOR MORE INFO CONTACT US
www.brenthurstwealth.co.za

BRENTHURST RANKED BEST
BOUTIQUE WEALTH MANAGER IN SA 2017
AND RUNNER-UP IN 2018
AT INTELLIDEX WEALTH MANAGER AND
PRIVATE BANKS AWARD

intellidex
Top Private Banks &
Wealth Managers

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ANOTHER TOP AWARD FOR BRENTHURST WEALTH

Head of Brenthurst's Stellenbosch office, Sonia du Plessis, won the inaugural title of Top Financial Advisor in SA at the 2019 Intellidex Top Private Banks and Wealth Manager awards, presented in Sandton in June.

Furthermore, Brenthurst retained its ranking as one of the top five Boutique Wealth Managers in South Africa, for the fourth consecutive year.

"This is an exceptional achievement for Sonia and for our entire team. It is recognition for our commitment to deliver excellence to our clients and validation for our strategy of building long term relationships, beyond providing investment and financial planning advice," says Brian Butchart, Managing Director.

"The Top Private Banks and Wealth Managers survey has established itself as SA's leading assessment of the industry. This year's survey marks the eighth anniversary of this review of one of the most competitive and successful industries in South Africa," Butchart says.

Brenthurst was awarded the top prize in the category for Boutique Wealth Managers in 2017, runner-up last year and was placed 4th this year, a mere 0.21 points behind the overall winner.

TOP WEALTH MANAGER -BOUTIQUES

INSTITUTION	RANK	OUT OF 10 (WEIGHTED)
NFB Private Wealth Management	1	8,85
Private Client Holdings	2	8,70
Gradidge-Mahura Investments	3	8,68
Brenthurst Wealth Management	4	8,64
Carrick Wealth	5	8,15

“The research methodology was changed somewhat this year, with more emphasis placed on responses received from the clients of the participating companies. Some 5 800 clients of the participant companies completed the survey, which according to Intellidex, is of the bigger sample sizes of any research in financial services in SA. The fact that Brenthurst ranked well again, is testament to our team’s approach and service levels,” Butchart added.

In the review of the various companies’ approaches to solutions for the different archetypes identified for the award, Brenthurst also performed well. Brenthurst was ranked in 4th place for passive lump sum investors and in 3rd placed for young professionals.

PASSIVE LUMP-SUM INVESTOR	RANK
NFB Private Wealth Management	1
Investec Wealth & Investment	2
Private Client Holdings	3
Brenthurst Wealth Management	4
PSG Wealth	5

YOUNG PROFESSIONAL	RANK
PSG Wealth	1
Gradidge-Mahura Investments	2
Brenthurst Wealth Management	3
Sanlam Private Wealth	4
Discovery Financial Consultant	5



In the archetype category for wealthy executives, Brenthurst was also ranked in 3rd place.

WEALTHY EXECUTIVE	RANK	WEIGHTED SCORE (OUT OF 10)
Investec Wealth & Investment	1	8,57
Carrick Wealth	2	8,15
Brenthurst Wealth Management	3	8,11
PSG Wealth	4	7,75
Standard Bank Wealth and Investment	5	7,23

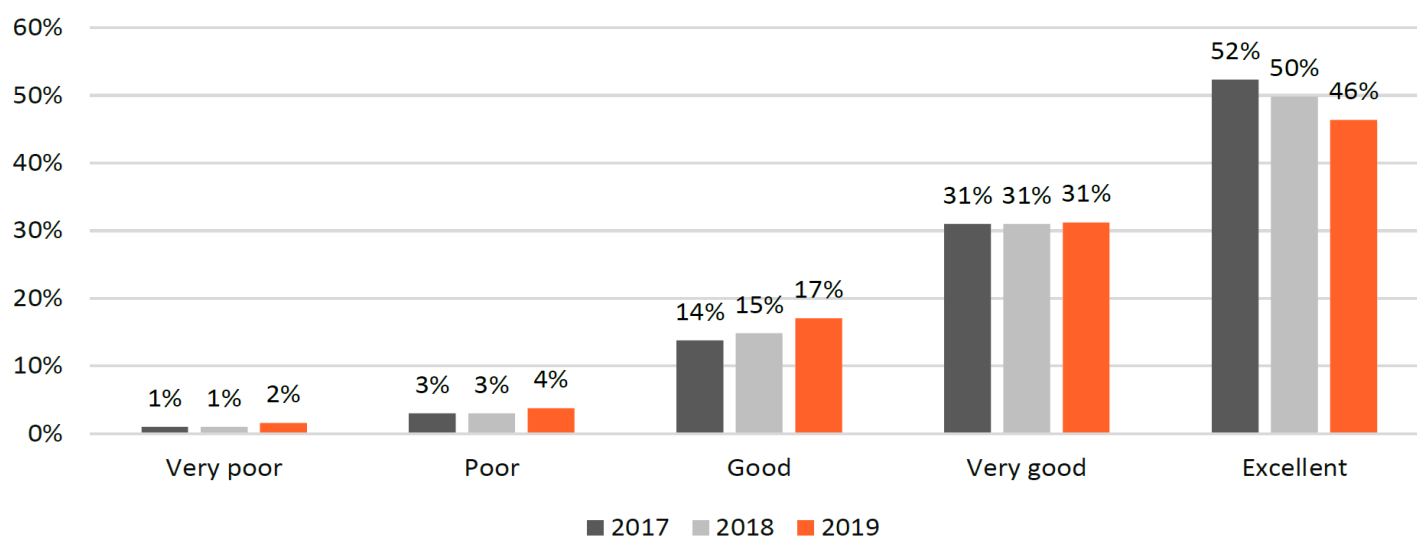
In the people’s choice section, Brenthurst was place 4th, again very few points (0.26) behind NFB Private Wealth Management.

In addition to the client survey, each participating company is required to provide corporate information, elaborate on its solutions and offerings and the calibre of team members. After the survey closed a panel of judges from within the highly qualified and experienced Intellidex team selects the final winners.

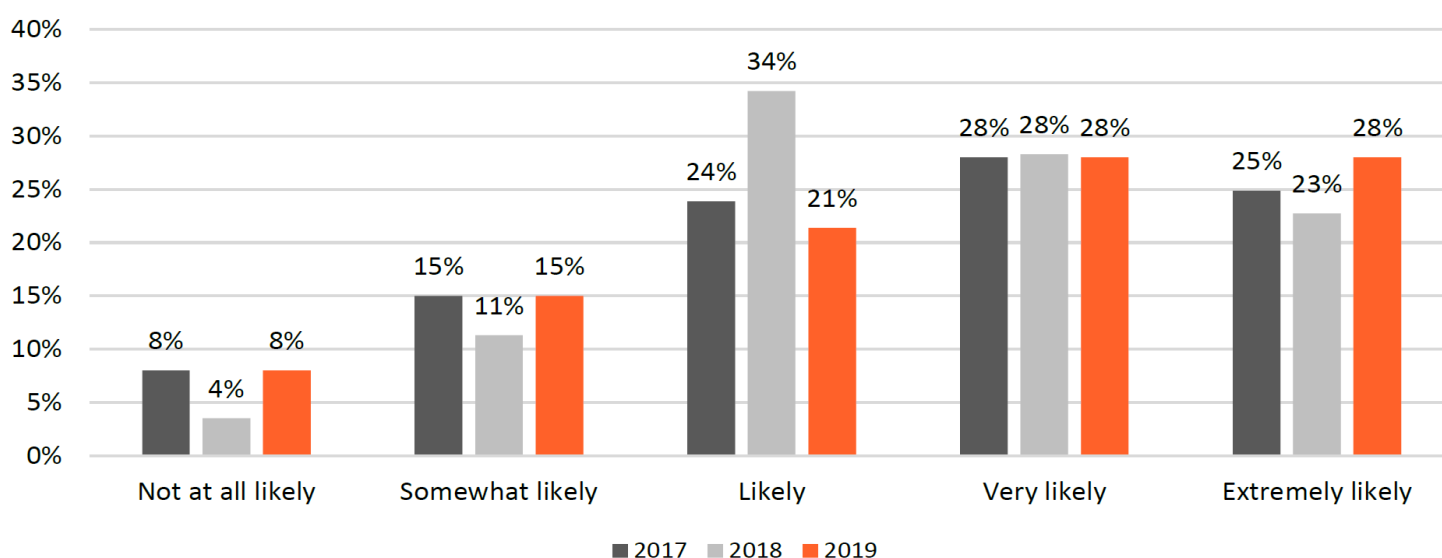
Beyond the accolades for the participating companies, the levels of service by the industry overall is rather impressive. Asked to rate the clarity and coherence of the investment plan provided by their respective wealth managers, 39% of respondents viewed this as ‘excellent’ and 36% ‘very good’. The health of the industry is further confirmed by the fact that 64% of respondents indicated that they are mostly satisfied with their wealth manager’s offering.

Respondents are also satisfied with overall service levels and the majority indicated that they will recommend their wealth manager to friends and family.

HOW DO YOU RATE THE OVERALL SERVICE LEVELS YOU RECEIVE FROM YOUR WEALTH MANAGER?



HOW LIKELY WOULD YOU BE TO RECOMMEND PRIVATE BANKER TO FRIENDS OR FAMILY?



The majority of clients are likely to recommend their private banks to acquaintances, which is an indication of their strong satisfaction levels.

“Thank you to all clients who participated in this survey. We appreciate your loyalty and the confidence you have that we always strive to serve your best interests. We will continue to strive towards excellence, and I am confident that we will remain amongst the leading wealth management companies in SA for years to come.” Butchart says.

WINNER OF THE BRENTHURST LUCKY DRAW

The winner of the lucky draw for Brenthurst clients who participated in the survey is **MR. BERNARD MAGUIRE**. He wins a weekend for two at a date of his choosing at the Polo Village on the luxury Val de Vie Estate in Paarl. Thank you for your participation Mr. Maguire, it is highly valued, and we trust you will enjoy the beauty of Paarl and surrounds.

SONIA DU PLESSIS -TOP FINANCIAL ADVISOR IN SA

Stellenbosch-based Brenthurst advisor Sonia du Plessis was announced as the Top Financial Advisor in SA at the 2019 Intellidex Private Banks and Wealth Manager Awards, in recognition of individual excellence in the wealth management sector.

According to Intellidex it was no easy task to select the winner as the feedback from respondents about their financial advisors was overwhelmingly positive. "It's clear that clients of wealth managers have a deep appreciation of the valuable work their advisors do," the company said.

"We are very proud of Sonia. She has been with Brenthurst for fifteen years and dedicated to deliver the best for her clients at all times. Well deserved," says Magnus Heystek, co-founder and Director of Brenthurst.

Sonia's clients had this to say in the survey questionnaire:

"Sonia is very competent and professional in looking after our financial interests, while at the same time taking a personal interest in our wellbeing as clients. We are not just a number."

"Someone will have to be exceptional to be rated higher than Sonia."

"To her the client comes first, before her own interests."

ADVISOR PROFILE: SONIA DU PLESSIS, CERTIFIED FINANCIAL PLANNER®



SONIA heads up the Stellenbosch office. She has been in the financial services industry since 2001 and was nominated as the Top Financial Advisor in SA 2019. She previously worked for Magnus Heystek International as well as Absa Private Bank where she gained valuable experience in investment and life insurance matters.

She obtained a B.Com degree in 2001 from the University of the Free State and was awarded the CERTIFIED FINANCIAL PLANNER® designation in 2004.

Sonia is a CERTIFIED FINANCIAL PLANNER® professional, a member of the Financial Planning Institute of South Africa and is fully qualified to give advice on all investment matters.

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TO BUILD, PROTECT AND GROW WEALTH REQUIRES A LONG-TERM FINANCIAL PLAN AND INVESTMENT STRATEGY

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