



Celebrating **7** years
OF CONSISTENT
EXCELLENCE

IN THIS ISSUE

Brenthurst continuously reviews and expands its services and solutions to provide exceptional investment solutions.

We are proud of our independence, credibility and proven track record, testament to our high growth and client retention rate.

INVESTING WITH SA'S

LEADING BOUTIQUE WEALTH MANAGER

WINNER 2020 & 2017 | RUNNER-UP 2023 & 2018
TOP 3 2022 & 2021 | TOP 4 2019

RANKED AMONGST THE TOP WEALTH
MANAGERS FOR 7 CONSECUTIVE YEARS



BRENTHURST WEALTH AWARDED

TOP BOUTIQUE WEALTH MANAGER

RUNNER-UP 2023

Brenthurst Wealth achieved second place in the category for the TOP boutique wealth managers in South Africa in the 2023 [Intellidex Private Banks and Wealth Manager Awards](#). This is the 7th consecutive year that Brenthurst ranks amongst the best wealth management companies in a very competitive financial services industry. Furthermore, Brenthurst was ranked in second place in the **People's Choice Award** category, which confirms that our clients appreciate our commitment to service and investment excellence.

TOP WEALTH MANAGER: BOUTIQUES

INSTITUTION	RANK	OUT OF 10 (WEIGHTED)
Centric Wealth Advisory	1	8,51
Brenthurst Wealth Management	2	8,25
BDO Wealth Advisers	3	8,14
Sterling Wealth	4	8,13
Efficient Wealth	5	8,03

Source: Intellidex

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JHB (SANDTON)	+27 (0) 10 035 1391
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"Brenthurst is excited to approach its 20th anniversary next year, reflecting on a remarkable journey of growth and success. From humble beginnings with just four individuals in our Fourways office, we have expanded to nine offices across South Africa and established an international presence in Mauritius. With a team of 23 financial planners and dedicated support staff, our growth is a testament to the unwavering support of our clients and the commitment of our teams. We take great pride in our consistent recognition as a leading wealth manager in the prestigious Intellidex Awards," says **Magnus Heystek, co-founder, Director, and Investment Strategist of Brenthurst.**



Heystek adds that the recognition in the People’s Choice category is of special significance as exceptional client service and delivering the best solutions suited to clients’ needs are the cornerstones of the Brenthurst’s approach.

The People’s Choice award is selected purely by clients of wealth managers and private banks through a comprehensive online questionnaire. This year a record number of 11,788 clients of private banks and wealth managers participated in the online survey. In its report about the 2023 awards, Intellidex notes that the large number of clients who participate enhances the credibility of the survey findings.

PEOPLE’S CHOICE: WEALTH MANAGER

INSTITUTION	RANK	OUT OF 10 (WEIGHTED)
Centric Wealth Advisory	1	6,80
Brenthurst Wealth Management	2	6,67
Sterling Private Wealth	3	6,66
PWM Wealth	4	6,56
Sasfin Wealth	5	6,46

Source: Intellidex

In the survey, Intellidex asks clients all about their service providers and their rankings — across a range of questions determining satisfaction levels in numerous categories that are extremely important to the participating firms. The process forms an integral part of the overall survey.

THE QUESTIONS THAT FEED DIRECTLY INTO THE RANKINGS FOR THIS AWARD RELATE TO:

- **The quality of service and advice.**
- **The likelihood of recommending the firm.**
- **Perceptions of value for money.**
- **The extent to which advice meets individual needs.**
- **The scope to improve offerings.**

Brian Butchart, CFP®, Managing Director of Brenthurst Wealth, states that delivering exceptional service and investment solutions requires a team effort. "All our teams – the advisors, administrative assistants, paraplanners, marketing executives, fiduciary experts, and tax advisory division – work together to provide a comprehensive solution to clients," Butchart says. He finds it heartening that clients have expressed their satisfaction with their approach, which secured the ranking for them in the People's Choice Category.

INTELLIDEX PRIVATE BANKS & WEALTH MANAGERS AWARDS 2023

Archetype **AWARD** *Executive*



Brenthurst also ranked amongst the top companies in five of the six archetype categories included in the awards - passive lump-sum investors, entrepreneurs, executives, young professionals and retirees.

The Intellidex Private Banks and Wealth Manager Awards are based on a review by a judging panel of financial industry experts and client reviews for the participating companies. As has been the case every year, the scoring was exceptionally close, proving the standard of client service delivered by wealth managers in SA.

"It is during the times of surging markets as well as the challenging times that the importance of client relationships and regular communication are highlighted. Our consistent excellent performance in this highly regarded award indicates that we continue to deliver the guidance and advice our clients expect from us," Heystek says.

*The winners of the weekend away at the award-winning Val de Vie Estate in Paarl are **Kirstin and Lorcan McHarry**. "The client participation in the survey is a key component of the overall scoring, and our clients did not disappoint. We award this lucky draw prize with pleasure and gratitude for our clients' votes and comments," says Sue Heystek, Marketing Director.*

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