



THE POWER
OF INDEPENDENT ADVICE

IN THIS ISSUE

Brenthurst is focused on delivering quality and appropriate independent advice that will deliver the best outcome for its clients.

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 2021

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BRENTHURST VOTED LEADING WEALTH MANAGER IN SOUTH AFRICA 2021

FOR A 5TH YEAR RUNNING BRENTHURST WEALTH WAS RANKED AS ONE OF THE LEADING WEALTH MANAGERS IN SOUTH AFRICA IN THE 2021 INTELLIDEX TOP PRIVATE BANKS AND WEALTH MANAGER AWARDS, WITH TOP FIVE RANKINGS IN FOUR CATEGORIES.

Brenthurst won the top award in 2017 and 2020 and for 2021 was ranked in the top three Boutique Wealth Managers in SA. In addition, Brenthurst Managing Director, Brian Butchart, ranked as one of the top relationship managers for the second consecutive year.

"We had an exceptional year of continued success, despite the challenges created by the outbreak of the global COVID-19 pandemic early last year. We added new clients, grew assets under management to above R10 bn and added more advisors at our offices across the country. We are very proud of our team and highly appreciative of the support of our clients – many of whom have trusted us with their investments since the establishment of Brenthurst Wealth in 2004," says Magnus Heystek, co-founder, director and investment strategist of Brenthurst.

The 2021 survey marks the 10th anniversary of this rigorous review of private banking and wealth management services in SA.

The Intellidex survey is conducted in two parts – a client survey and a review of the participating companies' investment approach by a panel of investment experts and the highly regarded Intellidex team. The results stem from a questionnaire completed by participating firms as well as feedback from their clients via an online survey.

This year a record number of 9,817 clients participated in the client survey, a significant sample size providing a meaningful reflection of the views of the universe of clients of South African private banks and wealth managers.

“The financial services industry in SA is very competitive and overall, of a high standard. The final scoring for the award confirms the level of competitiveness and shows that the leading companies, like Brenthurst, are all completely committed to deliver the best for clients. Our continued success in this industry review is confirmation that our client-centric approach, our independence and focus on delivering the best investment solutions secured our ranking as one of the leading wealth management companies,” Butchart says.

In a report prepared especially for Brenthurst post the award presentation, Intellidex notes that Brenthurst delivered a strong performance this year, taking third place in the Top Wealth Manager: Boutiques rankings.

“Clients express high levels of satisfaction with Brenthurst’s ratings beating the market average on most questions and performing well also against the average scores of boutique firms,” according to the report.

It also states that Brenthurst has enjoyed a noticeable jump in the percentage of clients who have been with it for less than a year, from 15% to 25%, indicating that it is acquiring clients at a healthy rate – well ahead of peers at 5%.

THE WINNER OF THE WEEKEND AWAY AT THE AWARD-WINNING VAL DE VIE ESTATE IN PAARL IS MR BRADLEY FARR FROM GAUTENG. “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 Butchart.

VISIT OUR NEW OFFICE AT VAL DE VIE | TEL: 021 100 3901

EMAIL ANDRE BASSON : andre@brenthurstwealth.co.za | TOP RANKED RELATIONSHIP MANAGER IN SA 2020



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A SNAPSHOT OF CLIENTS' COMMENTS:

- *"There is a saying: 'Desperate times calls for desperate measures'. Not at Brenthurst. During this unstable and unsettling times, I actually experienced more focus, calmness, confidence and positive energy from the team. This team has a plan and direction."*
- *"Almost like being part of a family. I will never invest anywhere else".*
- *"Very professional and always available when needed. Happy with service and feedback to date."*
- *"Brenthurst provided me, as a pensioner, with excellent and transparent financial advice."*
- *"I am very happy with their advice and philosophy. The fact that they are independent is important to me."*
- *"Extremely courteous and professional. Clients are really important to them, even when small portfolios are being dealt with."*

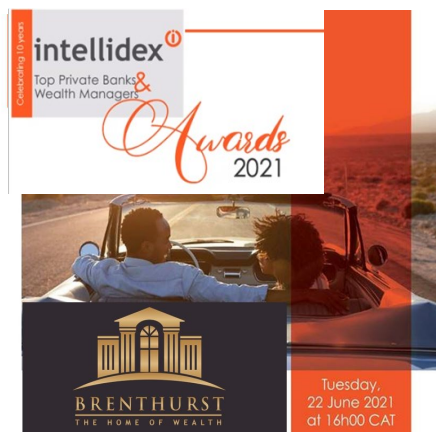
Read the full report about the [2021 Intellidex Private Banks and Wealth Manager Awards](#).

CONTACT ANY OF OUR HIGHLY QUALIFIED FINANCIAL ADVISORS AT OUR OFFICES COUNTRYWIDE TO DISCUSS YOUR INVESTMENT STRATEGY READ >> [BRENTHURST INVESTMENT PLANNERS](#)



**INVESTING WITH SA'S
LEADING BOUTIQUE WEALTH MANAGER**

**TOP 3 2021, WINNER 2020 & 2017
RUNNER UP 2018 & TOP 4 2019**



CONSISTENCY SETS US APART

"This is a powerful endorsement from our clients and exceptionally proud of the consistent value and service delivery from the team!"

Brian Butchart · Managing Director · BWM

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