



intellidex[®]
Top Private Banks
& Wealth Managers



THE POWER
OF INDEPENDENT ADVICE

IN THIS ISSUE

Brenthurst's daring and innovative strategies, strong focus on building long term relationships with clients and approach to independent advice ensures continued wealth creation for clients.

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

**BRENTHURST RANKED TOP
BOUTIQUE WEALTH MANAGER
IN SA 2020 INTELLIDEX
PRIVATE BANK AND
WEALTH MANAGER AWARD**

JHB (HQ)	+27 (0) 11 799 8100
JHB (SANDTON)	+27 (0) 10 035 1391
PTA	+27 (0) 12 347 8240
CAPE TOWN	+27 (0) 21 418 1236
BELLVILLE	+27 (0) 21 914 9646
CLAREMONT	+27 (0) 21 418 1236
STELLENBOSCH	+27 (0) 21 882 8706
PAARL (VAL DE VIE)	+27 (0) 21 100 3901
MAURITIUS	+ 230 5843 5215

PARTICIPATE & YOU COULD **WIN** A CASH PRIZE OF R10 000 & A UNIQUE GETAWAY

THE COVID-19 PANDEMIC HAS GRAVELY WOUNDED THE WORLD ECONOMY. One year later, economies, businesses, and individuals are still recovering and adapting to the new realities that developed in the wake of the global pandemic. For many, the impact was devastating and delivered financial and social hardship as well as family challenges and fears.

Wealth managers have shown to be of great value to investors during such times of volatility as they search for the best investment solution for clients, reviewing portfolios and adapting client's investment strategies to changed realities.

Brenthurst' investment committee and rigorous research process helped us identify themes and funds that reflected major trends and opportunities during these unprecedented times.

Our single-minded focus being building portfolios to match our clients' needs. This is one of the significant advantages Brenthurst holds over larger, institutional investment houses, as such independence allows the company flexibility to choose between 60 and 85 global funds and up to 50 domestic funds

As part of our commitment to review the best research available to serve our clients, we further appointed **award-winning independent economist Mike Schüssler** at the beginning of this year as Brenthurst consulting economist to provide us with exclusive research and present at our webinars.

We are pleased to announce that Intellidex, the esteemed research and publishing company just launched the 2021 survey to identify the top wealth managers and private banks.

BRENTHURST would greatly appreciate your participation in the client survey again, which will be presented in association with INVESTORS MONTHLY, a specialist investment publication of the respected business publication, FINANCIAL MAIL.

The survey is managed on-line and only requires a few minutes of your time. All answers will be treated with the strictest confidence. **To participate and share your rating of Brenthurst CLICK HERE:**

WIN R10 000 | WEALTH MANAGERS & PRIVATE BANK SURVEY 2021 | Deadline, 30 April 2021

- Your participation will automatically ensure an entry into the draw for **R10,000 once you complete the survey**. Winners of the Brenthurst draw and the Intellidex R10 000 prize will be announced in June.
- In order to stand a chance to win a two-night stay at the Val de Vie Estate in Paarl, Western Cape send a screen-shot of the last page of the survey confirming completion to your financial advisor.

In a very competitive financial services environment clients have come to expect outstanding service levels and investment solutions. Although similarities may exist between companies operating in the private client wealth management sector, each business tries to differentiate themselves and their solutions from their competitors.

Brenthurst spends a considerable amount of time and resources, researching global investment trends, and performing in-depth due diligence to identify investment opportunities, matching this to our client's objectives and risk profile. We pride ourselves in conducting independent research and tailor made solutions in order to provide superior long-term outcomes for our clients on an ongoing basis.

Read More: [Brenthurst-searching-for-global-megatrends-2020.pdf](#)

We are exceptionally proud that Brenthurst succeeded in delivering excellent service to our clients in 2020, by being awarded 'Top Boutique Wealth Manager in SA' by research and media company Intellidex.

This is the second time we achieved this accolade. In addition to winning the 2020 top award for boutique wealth managers, two of Brenthurst's advisors BRIAN BUTCHART and ANDRE BASSON were announced as amongst the top three relationship managers in SA, based on the client survey, which forms a major part of the award research methodology. Read More: [Brenthurst-voted-Top-Wealth-Manager-in-SA](#)

INVESTMENT PLANNING
RETIREMENT PLANNING
OFFSHORE INVESTMENTS
ESTATE PLANNING
FOREX SERVICES
TAX PLANNING
GLOBAL PROPERTY



INVESTING WITH SA'S
TOP BOUTIQUE WEALTH MANAGER 2020
WINNER 2017, RUNNER UP 2018 & IN THE TOP 4 2019

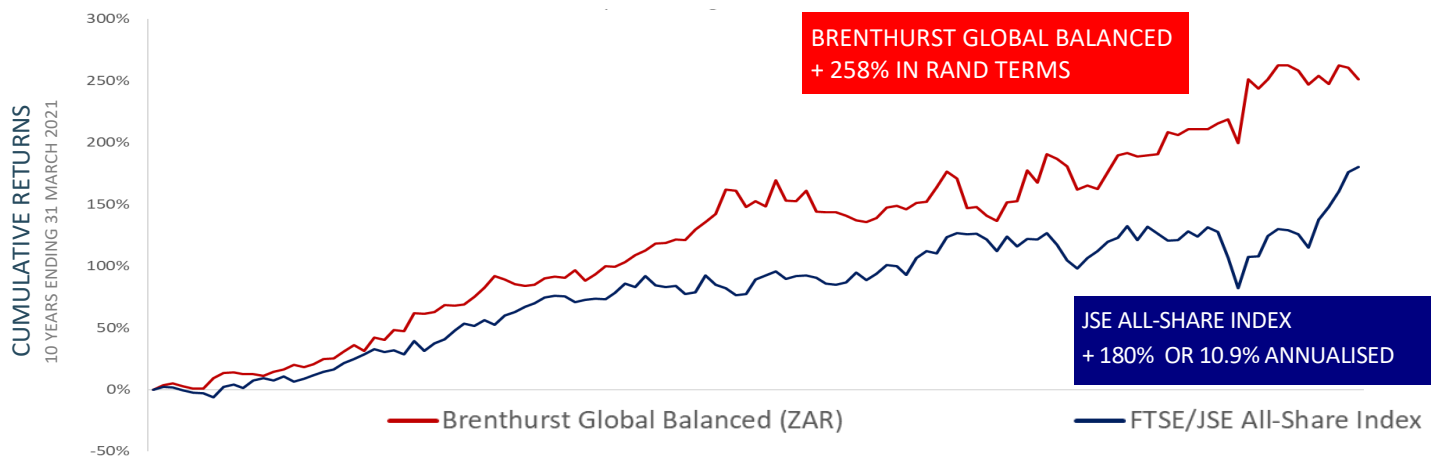
CREATING WEALTH
WITHOUT BORDERS

BRENTHURST GLOBAL BALANCED FUND CELEBRATES 10 YEARS

TEN years ago, Brenthurst took the bold and brave step of setting up its own globally managed fund for exclusive use of its clients. Not only has the fund survived and grown the investments of its clients handsomely, it also beat the performance of some of the better known brand names on the investments landscape.

The Fund also proved its worth over the past year, one of the most traumatic for investors and wider humanity in decades. The global economy suffered its deepest recession in 100 years, stock markets plunged into the steepest bear market in history, with all asset classes suffering as liquidity dried up. The Fund could not avoid its own worst drawdown under these circumstances, but the falls were much smaller than in equities and within a matter of weeks it had recovered the ground lost. Participating fully in the recovery over recent months, the fund is now up by close to 50% from the lows of last March.

BRENTHURST GLOBAL BALANCED (IN ZAR TERMS) VS. FTSE/JSE ALL-SHARE INDEX



WEBINAR INVITATION: INVESTING IN A POST COVID-19 WORLD

Markets have recovered from the worst fall-out after the lockdowns introduced globally in March 2020 drove stock prices down. Some economies have started to recover but in South Africa, the economic climate remains depressed. What are the threats and opportunities investors should be aware of?

MAGNUS HEYTEK Brenthurst investment strategist, **MIKE SCHÜSSLER** Brenthurst consulting economist and **TONY BELL** Raging Bull Award winner Mi-Plan Fund Manager will review the current climate and share their insights about investing in a post COVID-19 world.

Reserve your spot now: [BRENTHURST WEBINAR REGISTRATION](#)

INVESTING IN A POST COVID-19 WORLD THREATS AND OPPORTUNITIES



Magnus Heystek
INVESTMENT STRATEGIST



Tony Bell
FUND MANAGER IP OPPORTUNITY FUND
RAGING BULL WINNER FOR 5 YRS



Mike Schüssler
AWARD WINNING
ECONOMIST



WEBINAR

21 APRIL 2021 | 14:00 - 15:30

WHY CHOOSE US?

Brenthurst has an established track record of 17 years of exceptional service to clients and maintains a high client retention rate by providing independent investment advice and focusing on building long term relationships. Our philosophy of searching for the best investment options contributed to Brenthurst receiving accolades as one of the leading independent wealth management companies in South Africa.

Today the company has eight offices countrywide, an office in Mauritius and is close to having R10bn under management. We have 20 highly-qualified financial planners providing independent investment advice to more than 2800 clients.

AWARDS

BRENTHURST RANKED AS THE TOP BOUTIQUE WEALTH MANAGER IN SA 2020 AND 2017, RUNNER UP IN 2018 AND IN THE TOP 4 IN THE 2019 INTELLIDEX PRIVATE BANK & WEALTH MANAGER AWARD.

Our philosophy of searching for the best investment options contributed to Brenthurst receiving accolades as one of the leading independent wealth management companies in South Africa.

PROFESSIONAL

- Brenthurst adheres to the highest standards of professionalism and compliance management.
- The Brenthurst team is committed to ongoing professional development and all investment advisors, continuously attend local and international investment seminars and academic courses ensuring that the company's financial planning practice and compliance management is of the highest standards and ethics.

CERTIFIED

- Our team consists of 20 highly-qualified investment advisors, nine of whom are Certified Financial Planner® Professionals providing independent investment advice on an individual basis.
- Having a detailed financial plan provides you with a strategy to make practical financial decisions in all aspects of your life.
- Brenthurst's financial planner will guide you through the various financial decisions providing certainty regarding your financial future.

EXPERIENCE

- Brenthurst was established 2004 and has an established track record of exceptional service to clients providing independent investment advice and focussing on building long term relationships.

- BWM maintains a high client retention rate by providing independent investment advice and focusing on building long term relationships.

INDEPENDENT

- Brenthurst Wealth is totally independent and therefore not obliged to invest with any specific investment providers.
- Brenthurst is one of the largest independent wealth managers in the country not owned by any of the major financial institutions.
- Independence allows the company flexibility to choose from between 60 and 85 global funds and up to 50 domestic funds.

INVESTMENT STRATEGY

- Brenthurst's rigorous research process helps identify themes and funds that reflect major trends.
- Global megatrends such as health care, technology, biotechnology, demographics and more recently connectivity, artificial intelligence and cloud-computing are included in Brenthurst's portfolios. None of these are produced in SA and is only available elsewhere in the world.

CONSULTING ECONOMISTS

- The company consults economists and political analysts, among other sector experts, to form the Brenthurst "house-view", which informs how the company invests its clients' money.
- As part of our commitment to review the best research available to serve our clients, we appointed award-winning independent economist **Mike Schüssler** as Brenthurst consulting economist .
[Economist-Mike-Schussler-joins-Brenthurst-Wealth](#)

NATIONWIDE & INTERNATIONAL

- Despite the difficult year for many other businesses, Brenthurst was very fortunate to experience an upsurge in business activity throughout 2020.
- This growth in business and interest from current and potential clients resulted in the addition of two further offices, Paarl (Val de Vie Estate) and JHB (Sandton), taking its national network to eight locations, and the appointment of six additional advisers in a six-month period.

- The company's first international office was established in Mauritius in 2018, offering investment opportunities to clients as well as assisting in residency, setting up company trusts, registration, and administration.

SA'S TOP
BOUTIQUE WEALTH MANAGER 2020

YOUR PARTNER IN
WEALTH CREATION

EDUCATING THE NEXT GENERATION

Our clients spend a lifetime building up assets making huge sacrifices along the way. At some stage these assets will be passed on to the next generation. Many clients over many years have expressed the concerns - and even fear - that their children will not be sufficiently qualified and informed to make mature decision with their inheritance.

IN RESPONSE TO THIS WE HAVE DECIDED ON THE FOLLOWING COURSE OF ACTION:

1. Treating all children (from teenagers to adults) as clients of Brenthurst Wealth.
2. Adding them to our database in order to education them about the responsibility of inheriting and manage that windfall for the next generation.
3. Sending them our weekly newsletters so they get a better understanding of investment matters.
4. Arranging annual webinars to further prepare and school them in investment matters.
5. All our clients will be contacted in the next few weeks in order to obtain the personal details of children/spouses who wish to become part of this initiative.

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

BRENTHURST SERVICE OFFERING:

INVESTMENT PLANNING
RETIREMENT PLANNING
OFFSHORE INVESTMENTS

WILLS & ESTATE PLANNING
TAX PLANNING
FOREX SERVICES

LIFE / BUSINESS INSURANCE
EMPLOYEE BENEFITS
GLOBAL PROPERTY

READ MORE > BRENTHURST SEARCHING FOR GLOBAL MEGATRENDS, FINANCIAL MAIL

BRENTHURST OFFICES:

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Sandton +27 (0) 10 035 1391
Pretoria +27 (0) 12 347 8240
Cape Town Waterfront +27 (0) 21 418 1236

Claremont +27 (0) 21 418 1236
Bellville +27 (0) 21 914 9646
Stellenbosch +27 (0) 21 882 8706
Val de Vie Estate +27 (0) 21 100 3901
Mauritius 00 230 5843 5215

BRENTHURST SATELLITE OFFICES:

GARDEN ROUTE | KWAZULU-NATAL | FREE STATE | MPUMALANGA | NORTH WEST

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