

INVESTING WITH SA'S

LEADING BOUTIQUE WEALTH MANAGER

WINNER 2020 & 2017 | RUNNER-UP 2023 & 2018
TOP 3 2022 & 2021 | TOP 4 2025 & 2019*

INVEST BETTER
with **BRENTHURST**
BUILDING WEALTH SINCE 2004

20 YEARS
CONSISTENT EXCELLENCE

**Krutham Intellidex Private Bank & Wealth Manager Awards*



FSP No. 7833

BRENTHURST WEALTH WINS TOP BOUTIQUE WEALTH MANAGER

DAILY INVESTOR *Awards* 2025

BRENTHURST WAS VOTED THE MOST TRUSTED ADVISORY FIRM IN SA BY INVESTORS FOR 3 CONSECUTIVE YEARS.

Our commitment to excellence and a considered, forward-thinking investment strategy has secured us the Daily Investor Top Boutique Wealth Manager award for 2025 for the third consecutive year.

The award is based on a comprehensive survey about the financial services industry in South Africa, one the most successful and competitive local business sectors.

>> [Read more](#)

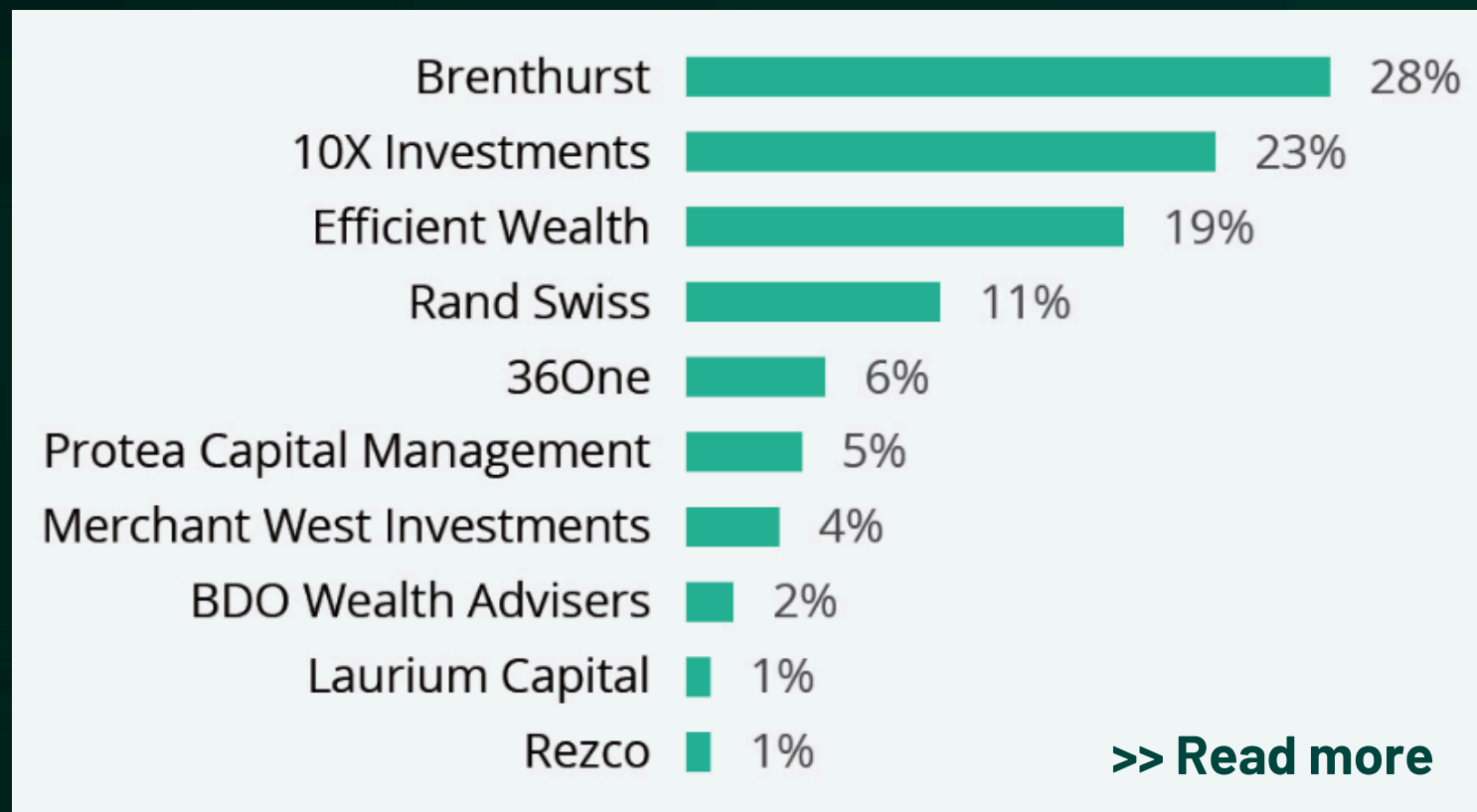


BRENTHURST WEALTH WINS TOP BOUTIQUE WEALTH MANAGER

DAILY INVESTOR *Awards*

BOUTIQUE WEALTH MANAGERS AND FUNDS SOUTH AFRICAN
INVESTORS WOULD CHOOSE IF THEY HAD TO INVEST MONEY

2024 SOUTH AFRICAN
INVESTOR & BANKING
REPORT



DAILY INVESTOR BRENTHURST AT THE TOP!

Kevin Lancaster | Chief Commercial Officer

"I have great news - Brenthurst has been rated top of its category in Daily Investor's 2024 South African Investor and Banking Report. It is so good to see Brenthurst as a top choice among our readers!"

"Brenthurst also has a good online marketing strategy, including webinars and newsletters, bolstering awareness around the company."

Celebrating **20** EST 2004
YEARS
SA'S MOST TRUSTED BOUTIQUE WEALTH MANAGER

CONSISTENT EXCELLENCE SETS US APART



RANKED AMONGST THE TOP WEALTH
MANAGERS FOR 8 CONSECUTIVE YEARS*

[>> Read More](#)



BRENTHURST ADVISORS RANK BEST
WEALTH MANAGER IN SOUTH AFRICA*

[>> Read More](#)



BRENTHURST RANKS AMONG THE BIG
NAMES IN FINANCIAL SERVICE

[>> Read More](#)



VOTED THE MOST TRUSTED ADVISORY FIRM IN SA
BY INVESTORS FOR THREE CONSECUTIVE YEARS

[>> Read More](#)

**Krutham Intellidex Private Bank & Wealth Manager Awards*



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WHY CHOOSE BRENTHURST AS YOUR WEALTH MANAGER?

OUR CLIENTS ARE OUR GREATEST ASSETS

At Brenthurst Wealth, we dedicate significant time and resources to understanding our clients, building long-term relationships, and offering innovative, independent wealth management solutions with a multidisciplinary value proposition.

HIGHLY QUALIFIED FINANCIAL ADVISORS

Our advisors possess in-depth knowledge of local and global markets, providing impartial and ongoing investment advice. We craft detailed financial plans that align with our clients' specific needs, circumstances and financial goals. Brenthurst is committed to upholding the highest ethical standards in all professional services provided.

INDEPENDENT ADVICE

Brenthurst Wealth operates independently, with no obligation to invest with specific providers. This freedom allows us to select from a wide range of offshore and local funds, ensuring personalized and unbiased investment solutions.

FOUNDED IN 2004 BRENTHURST HAS AN ESTABLISHED TRACK RECORD & EXPERIENCE

Since its establishment in 2004, Brenthurst Wealth has built a proven track record of exceptional client service. The company has consistently been ranked as a leading boutique wealth manager in South Africa for eight consecutive years.

Today the company has two offices in Mauritius and nine offices across South Africa, with 23 highly qualified financial advisors, most of whom hold the Certified Financial Planner® designation as well as various other qualifications. Brenthurst has almost 4000 clients and in excess of R20bn assets under management.

SINGLE-MINDED FOCUS

We maintain a single-minded focus on building portfolios tailored to our clients' needs—an advantage over larger institutional investment houses.

INNOVATIVE INVESTMENT STRATEGIES

Our investment strategies leverage diverse resources, including external asset managers, economists, political analysts, and independent research houses. This ensures dynamic and forward-thinking portfolio construction.

AWARD-WINNING FUND MANAGER JOINS BRENTHURST

Tony Bell, an award-winning fund manager, joined Brenthurst in 2020 as a consulting investment advisor. His contributions to our internal investment committee ensure robust research and the best fund selections for client portfolios.

SEARCHING FOR GLOBAL MEGATRENDS

Brenthurst identifies and invests in global megatrends, including healthcare, technology, biotechnology, demographics, artificial intelligence, cloud computing, and connectivity. This rigorous research process helps align client portfolios with emerging opportunities.

BRENTHURST RANKS AMONG THE BIG NAMES IN FINANCIAL SERVICES

Our commitment to excellence and a considered, forward-thinking investment strategy has secured us the Daily Investor Top Boutique Wealth Manager award for 2025 for the third consecutive year. High client retention rates reflect our commitment to building trust and strong relationships, even amid market volatility.

[>> READ MORE](#)

COMMITMENT TO INVESTMENT SUCCESS

Our approach prioritizes wealth creation and preservation through independent advice and a focus on building long-term client relationships. This ensures tailored strategies for every client's financial journey.

Clients remain with us despite the challenging investment landscape, mainly due to the trust they've placed in their relationship manager.

Brenthurst consistently delivers excellence, earning trust and recognition as one of SA's premier boutique wealth managers.

WHY CHOOSE BRENTHURST AS YOUR WEALTH MANAGER?

LEADING BOUTIQUE WEALTH MANAGER

Brenthurst Wealth has consistently demonstrated excellence in the financial sector, earning a prestigious reputation over the year in the Krutham Intellidex Private Bank & Wealth Manager Awards

Our accolades in the Boutique Wealth Manager Awards highlight our commitment to exceptional service and client satisfaction.

**WINNER 2020 & 2017 | RUNNER-UP 2023 & 2018
TOP 3 2022 & 2021 | TOP 4 2025 & 2019***

Being ranked among South Africa's leading boutique wealth managers for eight consecutive years is a testament to our dedication and expertise.

This consistent excellence sets us apart. Brenthurst advisors have been ranked as the best wealth managers in South Africa.* Brenthurst was also voted the Most Trusted Boutique Wealth Manager in South Africa for three consecutive years by Daily Investor.

*Krutham Top Wealth Manager & Private Banks Awards.

BRENTHURST ADVISORS RANK BEST WEALTH MANAGERS IN SOUTH AFRICA 2022 & 2024

Brenthurst has consistently achieved recognition for excellence and boasts SA'S TOP 3 WEALTH MANAGERS in 2024 and 2022.

Brian Butchart, CFP® and Managing Director of Brenthurst Wealth, was recognised as one of the country's top three Wealth Managers in 2024 and for three consecutive years prior, winning the overall title in 2022.

Sonia Du Plessis, CFP® and head of Brenthurst Stellenbosch, was named SA's Top Financial Advisor at the 2019 Intellidex Awards, placed second in 2022, and third in 2024.

Renee Eagar, CFP® and head of Brenthurst Claremont, won the prestigious SA Top Wealth Manager Award at the 2024 Krutham Awards and was also recognised among SA's top three financial advisors in 2022.

INVESTMENT PLANNING

CREATING GLOBAL WEALTH A LONG-TERM INVESTMENT STRATEGY

THE IMPORTANCE OF A LONG-TERM STRATEGY

At Brenthurst Wealth, we recognize that building and protecting wealth requires a disciplined and long-term investment strategy. Our team of highly qualified investment advisors provides sound and impartial advice tailored to each client's unique financial situation and objectives.

CREATING GLOBAL WEALTH

Brenthurst's independence allows us to select from a wide range of global and local funds, ensuring no ties to specific investment providers. This freedom enables us to design portfolios tailored to individual needs, risk tolerance, and financial goals, setting us apart from larger institutional investment houses.

PERSONALIZED PORTFOLIO MANAGEMENT

Our wealth managers provide personalised, objective advice to ensure your investments align with your financial aspirations. We actively manage portfolios, making strategic adjustments to navigate market changes and seize opportunities.

Clients benefit from regular communication and comprehensive updates, including weekly and monthly reports, to stay informed and confident throughout their financial journey.



OUR INVESTMENT PLANNING PROCESS INCLUDES THE FOLLOWING STEPS

1. Understanding our client's financial situation, investment goals, risk tolerance and time horizon.
2. Developing an investment plan that is tailored to our client's needs and objectives.
3. Selecting appropriate investment products and asset classes that align with our client's risk profile and investment objectives.
4. Implementing the investment plan by processing the necessary investments on behalf of the client.
5. Monitoring the investments regularly and making adjustments as needed to ensure that they remain aligned with the client's goals and objectives.
6. Brenthurst Wealth has a team of highly-qualified investment advisors who provide clients with sound and impartial investment advice on an individual basis.

Our investment planning services are designed to help clients achieve their financial objectives through a disciplined and structured approach to investing.

RETIREMENT PLANNING

SECURE YOUR FUTURE PLANNING YOUR RETIREMENT

It is as important to have a diversified investment approach during retirement as it is while accumulating wealth.

Fear and anxiety about market volatility, coupled with a low-growth environment, often drive retirees towards low-risk investment options to protect their capital. While a cautious approach can be wise, significantly increased longevity may have the unintended consequence of depleting assets too soon.

By avoiding growth assets, an investor may reduce their income-earning potential by at least ten years compared to someone with a balanced portfolio.

Through regular reviews and strategic adjustments, we help you stay on track to achieve your retirement dreams.

Low risk can inadvertently create a high-risk situation: depleted capital with many years of life still ahead.



OFFSHORE INVESTMENTS

DIVERSIFY OFFSHORE FOR LONG-TERM WEALTH CREATION

Offshore diversification has been a cornerstone of Brenthurst Wealth's investment strategy, with significant acceleration since 2010.

Investors who included offshore exposure in their portfolios have enjoyed considerably better returns compared to those who did not. Conversely, investors who failed to increase their offshore investments in recent years have faced substantial opportunity losses, experiencing little to no real growth in their investments, especially over one-, two-, and three-year periods in rand terms.

BUILD YOUR WEALTH GLOBALLY

Brenthurst Wealth's specialised offshore investment strategy helps clients diversify portfolios internationally, providing access to global markets and mitigating risks through geographical diversification.

Offshore investments are key to long-term wealth creation, offering enhanced growth opportunities compared to domestic-only portfolios.

ACCESS TO TOP GLOBAL FUND MANAGERS

Brenthurst partners with some of the world's best fund managers, including Templeton, Orbis, Investec, and others, ensuring access to high-quality funds across all asset classes.

FLEXIBLE OFFSHORE INVESTMENT OPTIONS

For clients wishing to avoid using their foreign exchange allowance, **Brenthurst also offers local asset-swap investment portfolios.** These options provide a seamless way to diversify internationally while maintaining compliance with local regulations.

TAX PLANNING

A PIVOTAL PART OF FINANCIAL PLANNING

Taxes impact personal finance and investment, making tax advisory an essential service at Brenthurst Wealth.

In addition to tax advice on investments and any other personal tax matters, Brenthurst also offers clients an e-filing service for provisional tax returns and payments.

OTHER TAX SERVICES OFFERED

- Income & company tax registrations
- Completion and submission of income tax returns
- Tax calculations & advice on tax planning and salary structuring
- Tax directives & disputes with SARS

INTERNATIONAL TAX SPECIALISTS

Brenthurst formed strategic partnerships with international tax specialists to assist clients with complex tax scenarios, emigration structuring, and foreign exchange guidance. This ensures legally compliant, efficient wealth preservation strategies across jurisdictions. We also recently employed a highly qualified internal tax specialist who previously worked at SARS.



LEGAL, FIDUCIARY & ESTATE PLANNING

ENSURING YOUR LEGACY

Wills, Deceased Estate Administration & Estate Planning

Is your will up to date? It is well known that more than 70% of people either do not have a will or have one that is outdated or no longer relevant.

At Brenthurst Wealth, we assist clients with the drafting and safekeeping of wills, as well as with estate planning and the administration of deceased estates.

Effective and relevant estate planning must be partnered with sound financial advice, knowledge of local and foreign tax implications, and a thorough understanding of estate administration laws in the jurisdictions where assets are held. Granted, it may not be possible for an executor to have detailed knowledge of every investment jurisdiction.

Choose your executor wisely. Question them on their understanding of each specific asset in your estate and how it will be managed. If they are unable to provide a comprehensive answer while you are alive and able to amend your will, they will almost certainly face challenges when it comes time to administer your estate.

Contact Brenthurst Wealth experts to assist you.

MALISSA COLIN

DIRECTOR | FPSA® (B COM, LLB)

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ROZANNE HEYSTEK-POTGIETER

CFP® & FIDUCIARY SERVICES SPECIALIST

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RISK PLANNING

PREPARE FOR LIFE'S UNCERTAINTIES

Before purchasing life insurance, consider your financial situation and the standard of living you want to secure for your dependants.

Regularly review your needs as your circumstances evolve. Consult a financial adviser to find the most appropriate cover and avoid overpaying.

Brenthurst Wealth offers independent insurance broking, sourcing the most competitive quotations from a range of providers to ensure our clients receive suitable products.

With the right information, you can simplify decision-making and choose the best option for your family.

Life insurance is one of the pillars of personal finance.

Contact Brenthurst Wealth experts to assist you.

LESLIE GREYLING

leslie@brenthurstwealth.co.za



FOREX

BEST CURRENCY EXCHANGE RATES

Brenthurst has a team of money exchange specialists with extensive knowledge and experience in managing international transfers, navigating exchange rate fluctuations, and identifying cost-effective solutions.

YOUR OFFSHORE INVESTMENT ALLOWANCE

South African individual investors can invest up to R11 million globally per annum:

- R10 million via an approved tax clearance
- R1 million on a Single Discretionary Allowance

Brenthurst offers competitive exchange rates and low transfer fees, resulting in potential savings compared to traditional banks or other money transfer providers. **To make use of your offshore allowance, contact our foreign exchange consultants.**

MAURITIUS - Yolande Butchart | ybutchart@brentwealth.mu

WESTERN CAPE - Suzean Haumann | suzean@brenthurstwealth.co.za

GAUTENG - Karen Munodawafa | karen@brenthurstwealth.co.za

WHY INVEST ABROAD?

Investing globally offers key benefits, including:

- Diversification of your investment portfolio
- Exposure to global growth opportunities
- Hedging against rand depreciation
- Mitigating SA's political and economic risks

OUR FOREIGN INVESTMENT SERVICES INCLUDE:

- Applying for foreign exchange clearance via SARS and the SA Reserve Bank
- Arranging placement of cleared funds with investment platforms
- Setting up offshore trusts, foreign bank accounts, and related services

EMPLOYEE BENEFITS

Brenthurst Wealth offers a range of employee benefit services to help businesses provide comprehensive and competitive packages to their employees. These services include:

- **Group Retirement Benefits:** Assisting businesses in setting up and managing group retirement plans such as pension plans, provident funds, and retirement annuities.
- **Group Risk Benefits:** Providing group risk benefits like life insurance, disability insurance, and critical illness cover.
- **Healthcare Benefits:** Setting up and managing employee healthcare benefits such as medical aid schemes and health insurance.
- **Employee Financial Education:** Offering financial education services to help employees understand and maximize their benefits, including retirement planning and investment education.

Contact Brenthurst Wealth experts to assist you.

CHRISTOFF POTGIETER

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DOROTHY AVVAKOUMIDES

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OFFSHORE TRUSTS & COMPANIES

BRENT WEALTH

Brenthurst operates an international wealth management office called Brent Wealth, and a fiduciary management company called Brent Consulta in Mauritius.

Brent Wealth provides comprehensive global wealth management and investment services to clients. It also offers discretionary wealth management and financial planning to both South African and international clients

Contact the Brentwealth Team in Mauritius to assist you with your investment strategies and safeguard your assets against various risks.

Contact Brent Wealth Team

GAVIN BUTCHART | gavinb@brentwealth.mu

YOLANDE BUTCHART | ybutchart@brentwealth.mu

>> VISIT THE BRENTWEALTH WEBSITE



OFFSHORE TRUSTS & COMPANIES

BRENT CONSULTA

SET UP A MAURITIUS TRUST TO PROTECT YOUR ASSETS

Brent Consulta, licensed by the Mauritius Financial Services Commission, offers a wide array of financial and fiduciary services to a diverse client base, including financial institutions, real estate multinationals, private equity firms, investment managers, high-net-worth individuals, SME businesses and retailers.

This collaboration enables Brenthurst Wealth to extend its reach and offer comprehensive financial services to its clients in Mauritius and South Africa.

Contact the Brent Consulta Team to set up offshore trusts and companies.

Gavin Butchart - Operational Director | gavinb@brentwealth.mu

Yolande Butchart - Forex & Property Expert | ybutchart@brentwealth.mu

Samina Jaffery - Managing Director | samina@brent.mu

>> VISIT THE BRENT CONSULTA WEBSITE



BRENT CONSULTA FOCUSES ON THE FOLLOWING SERVICES

- Set up and administration of global company and international trust structures.
- Appointment of trustees, directors and registered offices.
- Administration of companies, payroll and statutory returns.
- Resident permits and working visas.
- Commercial and residential investment property.
- Foreign exchange transfers and SARS and SADC tax clearance.
- Opening of Mauritius bank accounts without having to be present in Mauritius, with a choice of currencies.

BENEFITS OF SETTING UP AN OFFSHORE TRUST

- No documents are made public.
- Wealth protection.
- Tailored to specific family requirements.
- Recognised in all common law jurisdictions.
- An important tool in international income, capital gains and estate tax planning.
- Used by corporations for employee benefit plans, retirement and stock option schemes, insurance plans and special financing arrangements.

ASSETS THAT CAN BE HELD BY AN OFFSHORE TRUST

- Portfolios (shares and other stocks) in both quoted and unquoted companies
- Investment portfolios
- Real and intellectual property
- Bank deposits
- Life assurance policies issued on the life of the Settlor

VISIT ONE OF OUR OFFICES IN MAURITIUS

MAURITIUS NORTH

Grand Baie

Suite 005
Grand Baie Business Park
Grand Baie, Mauritius

MAURITIUS SOUTH

Black River

La Balise Business Park – Office
Block B, A3 Royal Road
Grande Rivière Noire , Mauritius



INTERNATIONAL PROPERTY SERVICES

MAURITIUS IS GROWING IN POPULARITY AS AN INVESTMENT, RELOCATION AND RETIREMENT DESTINATION

Brenthurst Wealth Management offers Mauritian property services to its clients through a Mauritian-based partnership.

We offer our clients international property services which include the acquisition, letting, furnishing and maintenance of the property.

Contact Our Mauritius Team for more information:

Gavin Butchart - Operational Director | gavinb@brentwealth.mu

Yolande Butchart - Forex & Property Expert | ybutchart@brentwealth.mu

BWM SHARE PORTFOLIO

ONLINE SHARE TRADING | PRIVATE EQUITY
STRUCTURED PRODUCT HEDGE FUNDS



Custodian specializes in investment funds and financial management, offering solutions designed to achieve sustainable income and capital stability.

Key Services:

Custodian BCI Income Plus Fund: Aims to generate sustainable income while maintaining capital stability, using protection strategies to reduce risk.

Custodian BCI Balanced Fund: Seeks moderate to high returns over the medium to long term by balancing growth and income through diversified investments.

Investment Philosophy: Custodian focuses on creating financial security by delivering consistent, sustainable long-term returns without undue risks. They diversify investments to optimize portfolios for less risk and more consistent returns.

Commitment to Clients: Custodian continually refines their investment style to meet market challenges while maintaining financial security. They prioritize high returns and portfolio stability.





TONY BELL & MI-PLAN JOIN BWM INVESTMENT COMMITTEE

Award-winning fund manager Tony Bell, joined Brenthurst Wealth as a consulting investment advisor in 2022.

TONY BELL CHIEF INVESTMENT OFFICER



Award-winning fund manager Tony Bell joined BWM as a consulting investment advisor in 2022.

With his extensive expertise, Tony Bell, Chief Investment Officer at ThinkCell, collaborates closely with our internal investment committee and the team at Mi-Plan. Together, they ensure optimal asset allocation and selection within the Brenthurst fund of funds range based on thorough research, benefiting the construction of client portfolios and delivering superior investment services and solutions to our valued clients.

This includes the Brenthurst BCI Balanced Fund of Funds, Brenthurst BCI Cautious Fund of Funds and Brenthurst BCI Worldwide Flexible Fund of Funds.

ANOTHER PERFECT 10!

MI-PLAN IP Global Macro celebrates 10 years of top-quartile performance.

Bell's successful management of the GLOBAL IP OPPORTUNITY FUND for Brenthurst clients via Mi-Plan for more than 10 years showcases an exceptional track record and earned the prestigious Raging Bull Award in the Global Multi-Asset Flexible category. The fund, more than R1.5 billion in size, has been a top quartile performer for many years.

Furthermore, their management of the MI-PLAN IP GLOBAL MACRO FUND has garnered 10 awards, including seven consecutive Raging Bull Awards from 2016 to 2022, setting an industry milestone.



DEON MEYER
BRENTHURST
BRAND AMBASSADOR

Award-winning Author

DEON MEYER

BRAND AMBASSADOR FOR BRENTHURST WEALTH

We are proud to announce an exciting collaboration with acclaimed South African fiction author, Deon Meyer. He will serve as the brand ambassador for Brenthurst Wealth, embodying the values and vision of our company.

“Deon has achieved global success and is known for his gripping storylines. Investing offers a different kind of suspense, and we believe that our process and his are similar, making him the perfect fit for us. Writing novels requires focus, dedication and time, just like investment strategies,” says Magnus Heystek, co-founder, director and investment strategist of Brenthurst Wealth.

Sue Heystek, Marketing Director, highlights the synergy between Brenthurst and Deon Meyer: “Collaborating with Deon is a perfect fit for Brenthurst. The marketing elements developed for this campaign align perfectly with our established brand strategy. Our approach is heavily focused on client communication, utilising a multi-media strategy to engage both our clients and the broader investor market. Additionally, Deon’s status as a global citizen who travels extensively complements our investment strategy, which is centered on offshore investing. This shared global perspective underscores our mutual approach to achieving success.”

“My life revolves around researching and writing books, television and film scripts. To manage my global assets, I consulted experts with a proven track record of excellent returns and a deep understanding of the value of relationships.” – Deon Meyer

MAGNUS HEYSTEK

INVESTMENT STRATEGIST & DIRECTOR

Magnus is a director of Brenthurst Wealth and is in charge of investment strategies and research as well as client communication.

He obtained a BA (Hons) degree from RAU and started his career as an investment journalist with Beeld in 1976, becoming the businesses and investment editor of The Star in 1986. During his career as an investment journalist, he attended countless international investment conferences across the world, including meetings of the International Monetary Fund and World Bank.

He was founder of The Star Investors Club, which he ran for ten years until 1998 when he sold his investment business to Citadel. He wrote his popular column Money Matters in The Star and other newspapers across the country for more than fourteen years.

Magnus initiated the first phone-in programme on personal finance on Radio 702, which he ran for 11 years. He has frequently appeared on local television programs, including the 52-part series, 'The World of Money', which was based on his book with the same title.

Magnus is the author of several books on investments and retirement planning, including 'Making Money Made Simple', 'The World of Money', 'Don't Say You Haven't Been Warned', 'Retirement: The Amazing and Scary Truth' and numerous other books. Magnus is also a regular commentator on various radio stations, such as Pretoria FM and Strictly Business | It's My Money.



MAGNUS HEYSTEK
INVESTMENT STRATEGIST
& DIRECTOR

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BRIAN BUTCHART CFP®

CO-FOUNDER & DIRECTOR

Brian was recognised as one of the country's top three wealth managers in SA's Intellidex Top Private Banks and Wealth Managers Awards consecutively in 2020, 2021 and the Winner in 2022.

He is also responsible for compliance and operations nationally across all nine offices. He has been in the financial services industry since 1998, and previously gained experience at Citadel and Magnus Heystek International.

Brian is also a key individual and representative for Brenthurst Capital (Pty) Ltd and a senior member of the investment committee dealing with all investment and asset allocation decisions.

Brian 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.

BRIAN BUTCHART
CERTIFIED FINANCIAL PLANNER®
& DIRECTOR

brianb@brenthurstwealth.co.za

Awards

Brian Butchart was recognised as one of the country's top three Wealth Managers in the Krutham Top Private Banks and Wealth Managers Awards in 2024 and consecutively in 2020, 2021 and the overall Winner in 2022.



krutham
An Intellidex Company

**TOP PRIVATE BANKS &
WEALTH MANAGER AWARDS**

CLIENT FINANCIAL SERVICE OFFERING

As experienced wealth managers, we look forward to working with our clients to create a financial plan and investment strategy best suited to their needs.

For us to get a better understanding of our client's risk profile and financial circumstances, we request that our clients complete the following documents:

1. Financial Needs Analysis
2. Letter of Authority
3. Brenthurst Finametrica Risk Tolerance Questionnaire
4. Brenthurst Service Level Agreement

INVEST BETTER
with **BRENTHURST**



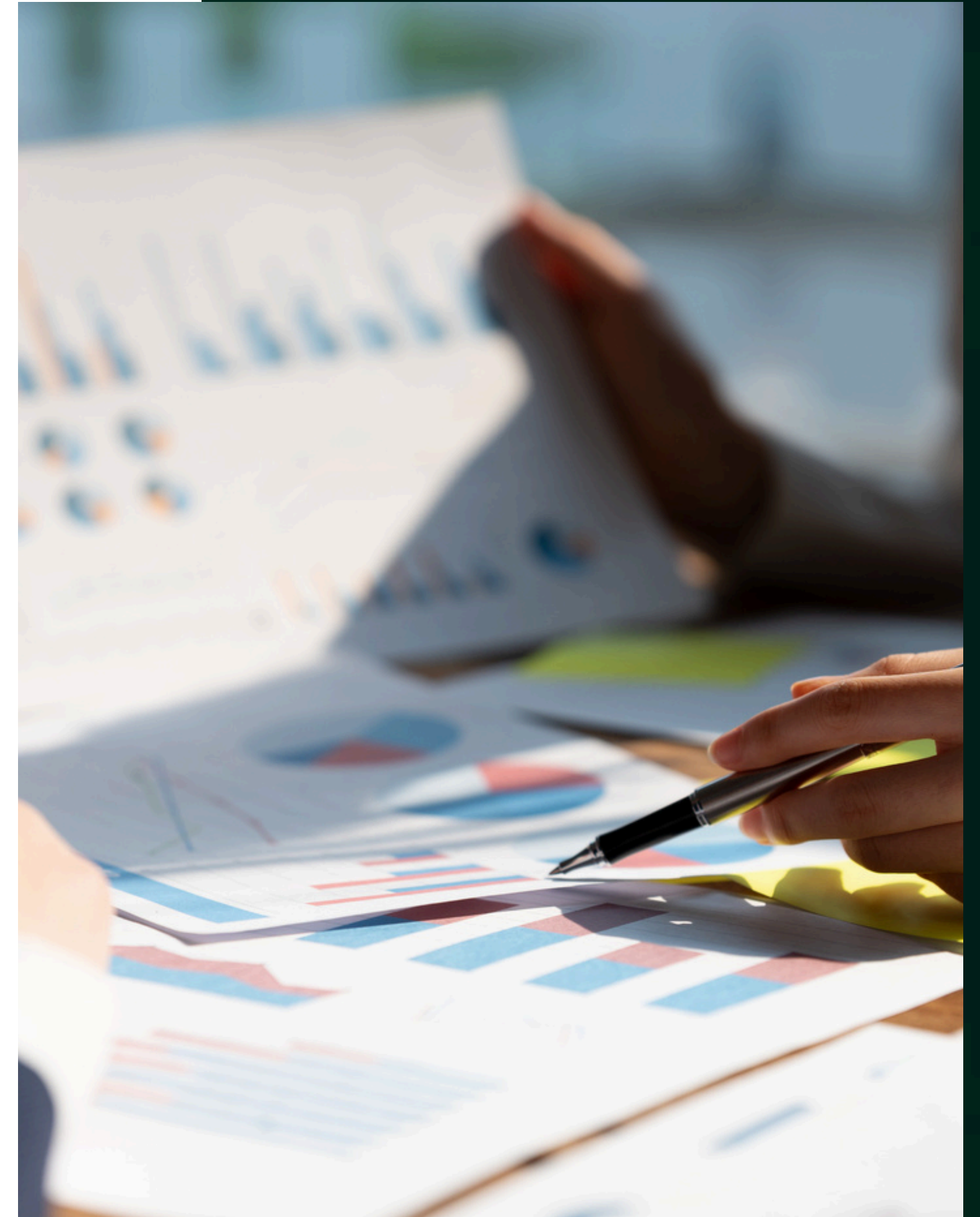
ONLINE PSYCHOMETRIC RISK PROFILING

Key to meeting a client's investment objectives is to perform a comprehensive financial needs analysis as accurately as possible, supported by an accurate risk profiling.

We augmented our financial planning process with the introduction of an online psychometric profiling tool offered by Finametrica.

This tool enables our financial planners to scientifically establish the risk tolerance of a client in terms of how emotionally comfortable a client is with taking financial risk.

The introduction of this tool has allowed Brenthurst Wealth Management to not only fully comply with the FSCA's FAIS requirements, but to better understand our clients' risk tolerance in order to meet their return expectations.



ONLINE MORNINGSTAR & FE ANALYTICS TOOLS

Morningstar and FE Analytics provides a comprehensive analysis of local and international financial investment instruments.

It is used extensively in our investment committee meetings for risk assessments, asset allocation, correlation and performance evaluation to make informed decisions on the rebalancing and optimising of our current house view and assessment of any financial instruments for consideration and inclusion in our houseview.

We also use the Morningstar tools for individual assessments of our client's portfolios during reviews and regular reporting to them.

INVEST BETTER
with **BRENTHURST**





THE ROLE OF BRENTHURST AS AN ADVISOR

- Brenthurst is not affiliated to any specific product and/or product supplier or asset manager, which allows us to provide truly independent advice.
- We select the most suitable products and investment options from various suppliers based on service delivery, cost and performance.
- Furthermore, we aim to minimise the risk associated with investments at specific institutions by investing our clients' money at sound and well-established financial institutions, where they always have control over their capital.
- Recommendations are personalised according to clients' circumstances and are regularly reviewed through analysis and attendance of financial seminars.
- Brenthurst believes that investment advice and devising a financial plan is not a once-off event. It requires continuous advice and management based on thorough knowledge of financial markets and investment products, both locally and offshore.
- Brenthurst Wealth takes responsibility for explaining, implementing and evaluating investment proposals and keeps record of all transactions.



BRENTHURST CLIENTS RECEIVE THE FOLLOWING ON AN ONGOING BASIS:

- Regular newsletters on tax, investments, new offerings, personal financial advice and market performance.
- Reviews and statements of your investments.
- Invitations to Brenthurst's investment seminars.
- Ongoing management of your investments.
- Advice on estate planning, drafting of wills, forex services, risk planning and related issues.
- Tax advice including tax planning, guidance with tax calculations, advice on the tax implications of specific investments and news on the latest tax law developments.

For any additional information please visit our website for full details of our team, our service offerings and all our offices countrywide & internationally (Mauritius)

>> [CLICK HERE TO VISIT OUR WEBSITE](#)



BRENTHURST WEALTH CLIENT APP

The Brenthurst Wealth app, is available on all Apple and Android phones and tablets and has undergone several updates over the past 12 months.

This enables clients to interact with Brenthurst from their mobile devices from which they can view their portfolios, find all contact details of our teams and offices, read our newsletters, view details of webinars and peruse our comprehensive service offering.

The Brenthurst app is optimised for the new iOS 16 as well as Android 13 release, so make sure your device has been updated to the latest software available for your mobile device.

FOLLOW THESE STEPS TO UPDATE YOUR APP:

- On your mobile device go to general settings > Software Update and check that your phone is running the latest software available for your device.
- Open AppStore (iPhone) or PlayStore (Android), search for Brenthurst and update to the new release.

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Magnus Heystek, director and investment strategist of Brenthurst Wealth, is a prominent "Twitter influencer" with a following of over 83, 000. Brenthurst Wealth's active presence on social media reflects our commitment to delivering timely insights and exceptional customer service.



SOCIAL MEDIA

Brenthurst has a strong presence on various social media platforms through which we share valuable insights, news and updates with our followers relating to finance and investment.

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BRENTHURST CHARITY EVENTS

CHANGE LIVES & CHANGE THE WORLD

Brenthurst supports several charitable organizations, many of which are involved in educating and supporting children.

These organisations include Boys and Girls Towns and the Reach for a Dream Foundation, and our relationships with them are well-established, some dating back as far as a decade. In addition, our offices support local projects in the cities where we operate, based on recommendations from our teams at those offices.

Brenthurst also launched the Youth 1000 Circles Program, an initiative aimed at eradicating suicide among young adults and encouraging them and their families to thrive and overcome challenges.

Brenthurst invites young adults to attend "socio-emotional life skills workshops" in a safe, confidential and non-judgmental space to promote inner self-healing and growth. This ability to see beyond your own world is an extension of the Brenthurst philosophy of "keeping it personal".



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- ThinkCell & Mi-Plan
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TOP 3 2022 & 2021, TOP 4 2019

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- Physical security
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- Access to personal information
- Secure communications
- Security in contracting out activities or functions
- Retention and disposal of information
- Acceptable usage of personal information
- Governance and regulatory issues
- Monitoring access and usage of private information
- Investigating and reacting to security incidents