

## Peak Investment Partners are Independent Portfolio Managers providing investment solutions to Individuals, DIY Super and Not for Profits

### Independent Portfolio Management Company

- Established in 2003 providing 'individually managed portfolios' (IMA's)
- Strong relationship with over 225 families and 300 individual portfolios
- Portfolios under management of over \$325m

### Investment Solutions

- Personal service with direct access to your own portfolio management team
- We listen to and understand your Needs & Risks
- We establish and manage your own individual portfolio
- Achieve after tax returns that meets your investment goals

### Your Personal Portfolio Management Team

- Ian Wenham – CEO ex BZW Australasia Research Director & Lowy Family
- Richard Nicholas – Director ex ANZ Priv. Bank, Hill Samuel (HK) & UBS (UK)
- Andrew Martin - Director ex ABN Amro, Deutsche Bank (US) & BZW Australia
- Paul Isreal – Portfolio Manager ex Navin, Etrade
- Kim McQuaid Irene Parker & Shellee Parker – Relationship & Admin Team

### Experience

- > 30 yrs
- > 30 yrs
- > 25 yrs
- > 15 yrs

### Direct Securities

- Manage Direct Australian Equities, Australian Hybrid income securities and overseas investments

### Our Clients

- High net worth families - Individuals, Family Trusts, DIY Super, Companies & Not for Profits

### Portfolio Services

- Your own designed Portfolio 'IMA' >\$500,000 through hPeak
- Your choice of 6 Model Portfolios 'SMA' < \$500,000 through Powerwrap 'smartwrap' investment via PDS

### Fees

- Annual Management Fees – normally tax deductible.

### Indicative Model Portfolios that may suit Your Personal Requirements\*

#### Annual Performance p.a. to 31 August 2014 (including tax credits but excludes fees and brokerage)

MODEL PORTFOLIOS	Income Equities	Inc + Growth Equities	Growth Equities	Recovery Equities	Smaller Co. Eqts	Income Hybrid Securities
<b>12 mths</b>	19.6%	13.9%	13.8%	14.2%	23.1%	8.4%
ASX 200 Acc. index	14.4%	14.4%	14.4%	14.4%	7.5%*	6.0%**
<b>Gain over index</b>	<b>+5.2%</b>	<b>-0.5%</b>	<b>-0.6%</b>	<b>-0.2%</b>	<b>+15.6%</b>	<b>+2.4%</b>
<b>2 years p.a.</b>	19.7%	18.0%	17.8%	18.2%	19.7%	8.6%
ASX 200 Acc. index	19.3%	19.3%	19.3%	19.3%	5.8%*	6.0%**
<b>Gain over index</b>	<b>+0.4%</b>	<b>-1.3%</b>	<b>-1.5%</b>	<b>-1.1%</b>	<b>+13.9%</b>	<b>+2.6%</b>
<b>3 years p.a.</b>	19.7%	14.1%	12.0%	14.5%	10.7%	8.0%
ASX 200 Acc. index	14.5%	14.5%	14.3%	14.5%	-0.2%*	6.0%**
<b>Gain over index</b>	<b>+5.2%</b>	<b>-0.4%</b>	<b>-2.3%</b>	<b>+0.0%</b>	<b>+10.9%</b>	<b>+2.0%</b>
<b>5 years p.a.</b>	15.5%	8.4%	6.6%	12.1%	10.1%	8.3%
ASX 200 Acc. index	9.3%	9.3%	9.3%	9.3%	1.8%	6.0%
<b>Gain over index</b>	<b>+6.2%</b>	<b>-0.9%</b>	<b>-2.7%</b>	<b>+2.8%</b>	<b>+8.3%</b>	<b>+2.3%</b>

Source: Praemium, Peak Investment Partners

Past performance is not a reliable indicator of future performance

\* ASX Smaller Ordinaries Acc. index

\*\* 6.0% Fixed

'Peak International Growth Model' +12.7% (02/01/2014 – 31/7/14)

\* While the returns above are from model portfolios within Praemium, they are not actual performance but indicative of the portfolios in Powerwrap. Changes to model portfolios reflect the views of the Peak investment committee.

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