

Peak Investment Partners are Personal Portfolio Managers helping Families, through SMSF's and Family Trusts, to Achieve their Investment Goals, through Direct Shares.

Independent Portfolio Management Company

- Established in 2003 providing 'individually managed portfolios' (IMA's)
- Strong relationship with over 120 families and 165 individual portfolios

What we can do for you:

- 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

Access to 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
- Irene Parker & Shellee Parker – Admin Team

Experience

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

Direct Australian Equities

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

Our Clients

- High net worth families - Individuals, Family Trusts, DIY Super, Companies & Charities

Portfolio Services

- Your own designed Portfolio 'IMA' >\$500,000
- Your choice of 6 Model Portfolios 'SMA' for amounts under \$500,000

Fees

- Annual Management Fees – normally tax deductible.

Model Portfolios as an Indication to Your Personal Requirements

Annual Performance p.a. to 30 November 2013 (including tax credits and fees but exc. brokerage)

| MODEL PORTFOLIOS | Income Equities | Inc + Growth Equities | Growth Equities | Recovery Equities | Smaller Co. Eqts | Income Hybrid Securities |
|------------------|-----------------|-----------------------|-----------------|-------------------|-------------------|--------------------------|
| 12 mths | 20.2% | 20.3% | 21.7% | 17.6% | 21.3% | 7.5% |
| 2 years p.a. | 20.7% | 17.9% | 16.2% | 14.8% | 12.8% | 7.3% |
| 3 years p.a. | 16.0% | 9.9% | 6.6% | 9.0% | 7.6% | 7.0% |
| 5 years p.a. | 17.6% | 13.7% | 11.9% | 18.1% | Started 1/2/09 | Started 12/2/09 |

Source: Praemium, Peak Investment Partners

Past performance is not a reliable indicator of future performance

* ASX Smaller Ordinaries Acc. index

** 6.5% Fixed

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