

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

**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 \$300m

**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 28 February 2014 (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
<b>12 mths</b>	12.3%	9.3%	13.2%	5.7%	23.9%	7.9%
ASX 200 Acc. index	10.6%	10.6%	10.6%	10.6%	-3.6%*	6.5%**
<b>Gain over index</b>	<b>+1.7%</b>	<b>-1.7%</b>	<b>+2.6%</b>	<b>-4.9%</b>	<b>+27.5%</b>	<b>+1.4%</b>
<b>2 years p.a.</b>	20.5%	16.3%	14.9%	12.6%	11.3%	8.2%
ASX 200 Acc. index	17.2%	17.2%	17.2%	17.2%	-3.0%*	6.5%**
<b>Gain over index</b>	<b>+3.3%</b>	<b>-0.9%</b>	<b>-2.3%</b>	<b>-4.6%</b>	<b>+14.3%</b>	<b>+1.7%</b>
<b>3 years p.a.</b>	15.2%	8.3%	6.2%	8.7%	7.8%	7.1%
ASX 200 Acc. index	8.7%	8.7%	8.7%	8.7%	-5.0%*	6.5%**
<b>Gain over index</b>	<b>+6.5%</b>	<b>-0.4%</b>	<b>-2.5%</b>	<b>+0.0%</b>	<b>+12.8%</b>	<b>+0.6%</b>
<b>5 years p.a.</b>	20.4%	15.9%	14.0%	22.4%	22.2%	10.7%
ASX 200 Acc. index	15.1%	15.1%	15.1%	15.1%	11.2%	6.5%
<b>Gain over index</b>	<b>+5.3%</b>	<b>+0.8%</b>	<b>-1.1%</b>	<b>+7.3%</b>	<b>+11.0%</b>	<b>+4.2%</b>

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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