

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

**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 \$315m

**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 Securities Choice**

- 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 through Powerwrap

**Fees**

- Annual Management Fees – normally tax deductible.

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

**Annual Performance p.a. to 30 May 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>         | 16.8%           | 15.4%                 | 18.5%           | 10.7%             | 26.4%            | 7.9%                     |
| ASX 200 Acc. index     | 16.5%           | 16.5%                 | 16.5%           | 16.5%             | 6.2%*            | 6.0%**                   |
| <b>Gain over index</b> | <b>+0.3%</b>    | <b>-0.9%</b>          | <b>+2.0%</b>    | <b>-5.8%</b>      | <b>+20.2%</b>    | <b>+1.9%</b>             |
| <b>2 years p.a.</b>    | 21.0%           | 19.9%                 | 18.4%           | 14.9%             | 15.0%            | 8.5%                     |
| ASX 200 Acc. index     | 21.4%           | 21.4%                 | 21.4%           | 21.4%             | 1.6%*            | 6.0%**                   |
| <b>Gain over index</b> | <b>-0.4%</b>    | <b>-1.5%</b>          | <b>-3.0%</b>    | <b>-6.5%</b>      | <b>+13.4%</b>    | <b>+2.5%</b>             |
| <b>3 years p.a.</b>    | 16.1%           | 9.2%                  | 6.7%            | 10.1%             | 8.0%             | 7.1%                     |
| ASX 200 Acc. index     | 10.3%           | 10.3%                 | 10.3%           | 10.3%             | -4.3%*           | 6.0%**                   |
| <b>Gain over index</b> | <b>+5.8%</b>    | <b>-1.1%</b>          | <b>-3.6%</b>    | <b>-0.2%</b>      | <b>+12.3%</b>    | <b>+1.1%</b>             |
| <b>5 years p.a.</b>    | 18.6%           | 12.4%                 | 10.7%           | 16.3%             | 13.2%            | 9.4%                     |
| ASX 200 Acc. index     | 12.4%           | 12.4%                 | 12.4%           | 12.4%             | 4.3%             | 6.0%                     |
| <b>Gain over index</b> | <b>+6.2%</b>    | <b>+0.0%</b>          | <b>-1.7%</b>    | <b>+3.9%</b>      | <b>+8.9%</b>     | <b>+3.4%</b>             |

Source: Praemium, Peak Investment Partners

\* ASX Smaller Ordinaries Acc. index

Past performance is not a reliable indicator of future performance

\*\* 6.0% Fixed

\* 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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