

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 Peak
- Your choice of 6 Model Portfolios 'SMA' < \$500,000 through Powerwrap 'Smartwrap' investment via PDS

Fees

- Annual Management Fees – normally tax deductible.

Any Combination of Model Portfolios may suit Your Personal Requirements*

Annual Performance p.a. to 31 December 2014 (including tax credits includes fees but excludes brokerage)

MODEL PORTFOLIOS	Income Equities	Inc + Growth Equities	Growth Equities	Recovery Equities	Smaller Co. Eqts	Income Hybrid Securities
12 months	15.5%	10.0%	5.2%	-0.7%	8.3%	4.3%
ASX 200 Acc. index	5.6%	5.6%	5.6%	5.6%	-3.8%*	6.0%**
Gain over index	+9.9%	+4.4%	-0.4%	-6.3%	+9.7%	-1.7%
2 years p.a.	17.3%	14.5%	12.9%	6.0%	12.9%	6.3%
ASX 200 Acc. index	12.7%	12.7%	12.7%	12.7%	-2.3%*	6.0%**
Gain over index	+4.6%	+1.8%	+0.2%	-6.7%	+15.2%	+0.3%
3 years p.a.	18.8%	16.4%	14.0%	10.4%	13.0%	6.4%
ASX 200 Acc. index	15.1%	15.1%	15.1%	15.1%	0.6%*	6.0%**
Gain over index	+3.7%	+1.3%	-1.1%	-4.7%	+12.4%	+0.4%
5 years p.a.	13.5%	8.4%	5.6%	7.6%	7.5%	7.3%
ASX 200 Acc. index	6.8%	6.8%	6.8%	6.8%	-2.0%*	6.0%**
Gain over index	+6.7%	+1.6%	-1.2%	+1.2%	+9.5%	+1.3%

Source: Praemium, Peak Investment Partners

Past performance is not a reliable indicator of future performance

* ASX Smaller Ordinaries Acc. index

** 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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