

Independent Portfolio Management Company

- Peak established in 2003 providing 'individually managed portfolios' (IMA's)
- Strong relationship with over 240 families between 300 individual portfolios
- Portfolios under management of over \$330m

Investment Solutions 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

Your Personal Portfolio Management Team

- Ian Wenham – CEO, CIO ex BZW Australasia Research Director & Lowy Family
- Richard Nicholas – Director ex ANZ Private Bank, Hill Samuel (HK) & UBS (UK)
- Andrew Martin - Director ex ABN Amro, Deutsche Bank (US) & BZW Australia
- Paul Israel – Portfolio Manager ex Navin & Etrade
- Kim McQuaid, Irene Parker & Shellie 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 Peak Model Portfolios 'SMA' < \$500,000 through Powerwrap 'Smartwrap' investment via PDS

Fees

- Annual Management Fees – normally tax deductible, but please check with your accountant

Model Portfolios Performance – Please choose whatever combination suits your needs and risk

TO 29 FEB 2016	Lower Risk	Medium Risk	Higher Risk	Higher Risk	Lower Risk	Lower Risk
MODEL PORTFOLIOS	Income Equities	Inc + Growth Equities	Growth Equities	Smaller Co. Eqts	Income Hybrid Securities	Model Mix 50% Hybrids 50% Inc. Eqts
12 months	-6.0%	-7.1%	-2.0%	14.8%	0.0%	-3.0%
ASX 300 Acc. index	-13.5%	-13.5%	-13.5%	-3.6%*	5.0%**	-4.3%
Gain over index	+7.5%	+6.4%	+11.5%	+18.4%	-5.0%	+1.3%
2 years p.a.	10.2%	4.3%	5.1%	13.7%	3.1%	4.1%
ASX 300 Acc. index	-0.6%	-0.6%	-0.6%	-0.3%*	5.0%**	2.2%
Gain over index	+10.8%	+4.9%	+5.7%	+14.0%	-1.9%	+1.9%
3 years p.a.	12.3%	6.4%	7.8%	17.0%	4.7%	8.5%
ASX 300 Acc. index	2.9%	2.9%	2.9%	-1.4%*	5.0%**	4.0%
Gain over index	+9.4%	+3.5%	+4.9%	+18.4%	-0.3%	+4.5%
5 years p.a.	16.0%	7.4%	5.7%	10.1%	5.4%	10.7%
ASX 300 Acc. index	4.6%	4.6%	4.6%	-3.2%*	5.0%**	4.8%
Gain over index	+11.4%	+2.8%	+1.1%	+6.9%	+0.4%	+5.9%

Source: Praemium, Peak Investment Partners

* ASX Smaller Ordinaries Acc. index

** 5.0% Fixed

Past performance is not a reliable indicator of future performance

The above indicative returns are from Peak model portfolios, and reflect the views of the Peak investment committee

Returns include tax credits and exclude fees and brokerage.

Peak Investment Partners Pty Ltd is an Authorised Representative of Peak Investment Holdings Pty Ltd AFSL 304008
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