

Peak Investment Partners are Personal Portfolio Managers that help Families achieve their Investment Goals through Direct Shares.



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

Independent Portfolio Management Company

- Established in 2003 providing ‘individually managed portfolios’ (IMA’s)
- Strong relationship with 90 families and 130 individual portfolios

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 Fixed interest hybrids 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 31 January 2013 (inc. tax credits and fees but exc. brokerage)

MODEL PORTFOLIOS	Income Equities	Balanced Equities	Growth Equities	Recovery Equities	Smaller Co. Eqts	Fixed Interest Hybrids
12 mths	23.7%	19.4%	14.7%	22.1%	9.2%	7.1%
ASX 200 Acc	20.1%	20.1%	20.1%	20.1%	3.1%*	7.0%**
Outperformance	+3.6%	-0.7%	-5.4%	+2.0%	+6.1%	+0.1%
2 years p.a.	15.7%	6.8%	1.9%	9.6%	1.1%	6.6%
ASX 200 Acc.	6.2%	6.2%	6.2%	6.2%	-5.6%*	7.0%**
Outperformance	+9.5%	+0.6%	-4.3%	+3.4%	+6.7%	-0.4%
3 years p.a.	13.9%	7.0%	3.6%	12.6%	7.4%	7.6%
ASX 200 Acc	6.9%	6.9%	6.9%	6.9%	2.1%*	7.0%**
Outperformance	+7.0%	+0.1%	-3.3%	+5.7%	+5.3%	+0.6%
5 years p.a.	8.2%	3.7%	1.8%	Started	Started	Started
ASX 200 Acc	1.6%	1.6%	1.6%	20/11/08	1/2/09	12/2/09
Outperformance	+6.6%	+2.1%	+0.2%			

Source: Praemium, Peak Investment Partners

Past performance is not a reliable indicator of future performance

* ASX Smaller Ords Acc. index

** 7.0% Fixed

Contact: Richard Nicholas at richardn@peakinvest.com.au Tel: 8274 5809 or 0419 129112 Website: www.peakinvest.com.au