

**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 28 February 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
<b>12 mths</b>	29.2%	27.4%	16.5%	20.0%	0.0%	8.3%
ASX 200 Acc	24.2%	24.2%	24.2%	24.2%	-2.4%*	7.0%**
<b>Outperformance</b>	<b>+5.0%</b>	<b>+3.2%</b>	<b>-7.7%</b>	<b>-4.2%</b>	<b>+2.4%</b>	<b>+1.3%</b>
<b>2 years p.a.</b>	16.7%	9.4%	2.8%	10.3%	0.5%	6.6%
ASX 200 Acc.	7.7%	7.7%	7.7%	7.7%	-5.8%*	7.0%**
<b>Outperformance</b>	<b>+9.0%</b>	<b>+1.7%</b>	<b>-4.9%</b>	<b>+2.6%</b>	<b>+5.8%</b>	<b>-0.4%</b>
<b>3 years p.a.</b>	14.4%	8.7%	4.3%	13.6%	6.1%	8.3%
ASX 200 Acc	8.0%	8.0%	8.0%	8.0%	2.6%*	7.0%**
<b>Outperformance</b>	<b>+6.4%</b>	<b>+0.7%</b>	<b>-3.7%</b>	<b>+5.6%</b>	<b>+3.5%</b>	<b>+1.3%</b>
<b>5 years p.a.</b>	9.9%	5.1%	2.9%	Started	Started	Started
ASX 200 Acc	2.9%	2.9%	2.9%	20/11/08	1/2/09	12/2/09
<b>Outperformance</b>	<b>+7.0%</b>	<b>+2.2%</b>	<b>+0.0%</b>			

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](mailto:richardn@peakinvest.com.au) Tel: 8274 5809 or 0419 129112 Website: [www.peakinvest.com.au](http://www.peakinvest.com.au)