

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



Independent Portfolio Management Company

- Established in 2003 providing ‘individually managed portfolios’ (IMA’s)
- Strong relationship with over 100 families and 150 individual portfolios

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 Australian Equities

- 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

Fees

- Annual Management Fees – normally tax deductible.

Model Portfolios as an Indication to Your Personal Requirements

Annual Performance p.a. to 30 June 2013 (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
12 mths	22.9%	21.1%	17.7%	17.4%	9.4%	9.7%
ASX 200 Acc. index	22.8%	22.8%	22.8%	22.8%	-5.3%*	6.5%**
Gain over index	+0.1%	-1.7%	-5.1%	-5.4%	+14.7%	+3.2%
2 years p.a.	16.5%	6.6%	2.5%	8.2%	-0.4%	7.3%
ASX 200 Acc. index	7.0%	7.0%	7.0%	7.0%	-10.1%*	6.5%**
Gain over index	+9.5%	-0.4%	-4.5%	+1.2%	+9.7%	+0.8%
3 years p.a.	15.5%	8.5%	5.8%	10.7%	7.6%	9.0%
ASX 200 Acc. index	8.6%	8.6%	8.6%	8.6%	-2.0%*	6.5%**
Gain over index	+6.9%	-0.1%	-2.8%	+2.1%	+9.6%	+2.5%
5 years p.a.	12.0%	5.2%	3.3%	Started	Started	Started
ASX 200 Acc. index	2.9%	2.9%	2.9%	20/11/08	1/2/09	12/2/09
Gain over index	+9.1%	+2.3%	+0.4%			

Source: Praemium, Peak Investment Partners

Past performance is not a reliable indicator of future performance

* ASX Smaller Ordinaries Acc. index

** 6.5% Fixed

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