

*Peak Investment Partners are Personal Portfolio Managers that help Families, through SMSF and Family Trusts, achieve their Investment Goal, through Direct Shares.*



### Independent Portfolio Management Company

- Established in 2003 providing 'individually managed portfolios' (IMA's)
- Strong relationship with over 110 families and 160 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 31 October 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
<b>12 mths</b>	23.0%	24.3%	22.1%	23.7%	23.7%	8.5%
ASX 200 Acc. index	25.5%	25.5%	25.5%	25.5%	2.9%*	6.5%**
<b>Gain over index</b>	<b>-2.5%</b>	<b>-0.8%</b>	<b>-3.4%</b>	<b>-1.8%</b>	<b>+20.8%</b>	<b>+2.0%</b>
<b>2 years p.a.</b>	21.0%	17.0%	14.8%	15.7%	13.8%	7.7%
ASX 200 Acc. index	17.6%	17.6%	17.6%	17.6%	0.1%*	6.5%**
<b>Gain over index</b>	<b>+3.4%</b>	<b>-0.6%</b>	<b>-2.8%</b>	<b>-1.9%</b>	<b>+13.7%</b>	<b>+1.2%</b>
<b>3 years p.a.</b>	15.7%	9.8%	6.6%	11.5%	9.2%	7.2%
ASX 200 Acc. index	10.1%	10.1%	10.1%	10.1%	-2.7%*	6.5%**
<b>Gain over index</b>	<b>+5.6%</b>	<b>-0.3%</b>	<b>-3.5%</b>	<b>+0.6%</b>	<b>+11.9%</b>	<b>+0.7%</b>
<b>5 years p.a.</b>	16.4%	13.1%	10.8%	Started	Started	Started
ASX 200 Acc. index	11.1%	11.1%	11.1%	20/11/08	1/2/09	12/2/09
<b>Gain over index</b>	<b>+5.3%</b>	<b>+2.0%</b>	<b>-0.3%</b>			

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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