

**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 over 100 families and 150 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 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 March 2013 (including tax credits and fees but exc. brokerage)**

MODEL PORTFOLIOS	Income Equities	Inc + Growth Equities	Growth Equities	Recovery Equities	Smaller Co. Eqts	Hybrid Income Securities
<b>12 mths</b>	26.3%	20.6%	14.3%	13.2%	-3.5%	8.3%
ASX 200 Acc. index	20.0%	20.0%	20.0%	20.0%	-5.8%*	6.5%**
<b>Gain over index</b>	<b>+6.3%</b>	<b>+0.6%</b>	<b>-5.7%</b>	<b>-6.8%</b>	<b>+2.3%</b>	<b>+1.8%</b>
<b>2 years p.a.</b>	16.5%	6.7%	0.9%	8.3%	-1.3%	6.9%
ASX 200 Acc. index	6.2%	6.2%	6.2%	6.2%	-7.2%*	6.5%**
<b>Gain over index</b>	<b>+10.3%</b>	<b>+0.5%</b>	<b>-5.3%</b>	<b>+2.1%</b>	<b>+5.9%</b>	<b>+0.4%</b>
<b>3 years p.a.</b>	13.0%	4.7%	1.2%	10.0%	4.3%	8.1%
ASX 200 Acc. index	5.2%	5.2%	5.2%	5.2%	-0.8%*	6.5%**
<b>Gain over index</b>	<b>+7.8%</b>	<b>-0.5%</b>	<b>-4.0%</b>	<b>+4.8%</b>	<b>+5.1%</b>	<b>+1.6%</b>
<b>5 years p.a.</b>	9.9%	4.9%	2.8%	Started	Started	Started
ASX 200 Acc. index	3.1%	3.1%	3.1%	20/11/08	1/2/09	12/2/09
<b>Gain over index</b>	<b>+6.8%</b>	<b>+1.8%</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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