



CHARTERED ACCOUNTANTS
AND FINANCIAL SERVICES

INVESTMENTS

HELPING YOU TO PREPARE A PERSONAL INVESTMENT PLAN

- to build your personal investment portfolio
- analyse your personal situation and advising accordingly
- to achieve your retirement goals
- reporting back to you on a regular basis
- giving advice on and managing your pension fund

MANAGING YOUR SHARE PORTFOLIO

- helping you to build a share portfolio
- working closely with well known brokers and asset managers
- managing your share portfolio
- investing your funds in the BV / PSG portfolio
- assisting you with share trading

ADVICE ON AND MANAGEMENT OF UNIT TRUSTS

- giving advice on various unit trusts
- helping you to build a balanced unit trust portfolio
- using well respected funds over a broad spectrum
- assisting you in buying and selling
- advising on switches between funds

ADVICE ON PROPERTY INVESTMENTS

- helping you to invest in property as part of your portfolio
- advising on direct property investments
- assisting with the letting of your property
- assisting with indirect property investment through property trusts on the JSE

MONEY MARKETS AND OTHER CASH INVESTMENTS

- advising you on interest bearing investments
- getting quotations for the best interest rates
- using money market products from various companies
- using bond based unit trusts
- using fixed deposits of various banks

ADVICE ON OFFSHORE INVESTMENTS

- assisting you to open an off-shore account
- advice on various offshore investments
- using off-shore unit trusts of various respected companies
- advising on what offshore asset classes to use
- helping you to balance regions and denominations