

PORTFOLIO BUREAU

PRIVATE WEALTH MANAGERS

A HOLISTIC APPROACH TO FINANCIAL PLANNING.



Clients based in:
South Africa, UK,
France, Canada,
Israel, Australia, USA,
Portugal, Italy,
Guernsey.

STRATEGIC PARTNERSHIPS

Portfolio Bureau Investments

Legacy Nominees (Money Market)

Anchor Capital (Asset Manager)



EXPERIENCED & HIGH QUALITY PROFESSIONAL TEAM

We work with only the top performing local and international fund managers and administrators.

6

Financial
Advisors



11

Administrative
Assistants

91

Years of collective
experience among
the Directors.

5

Money Market
Administrators

OUR SERVICES INCLUDE



Local & International Investments,
Pre-retirement
& Post-retirement Planning



Estate & Risk Planning



Employer and
Employee Benefits



Medical Aid



R9 BILLION

Assets under management and
administration as of 31/12/22.

YOUR PLAN. OUR PURPOSE.

When it comes to financial planning,
we don't believe in copy and paste.
First, we understand you, your needs,
your dreams, your everything; then we
help you grow your wealth.



COMPANY
FOUNDED IN

1996

INVESTMENT PLANNING

Are you giving your wealth the best chance of growing? Creating and preserving wealth isn't just about where money is invested. We'll look at what investment risk is appropriate, your income and expenses, liquidity, tax needs, investment duration, and other confusing words that we'll make clearer, so that we can invest your money and get the best return possible.

UNIT TRUSTS | TAX-FREE SAVINGS | DIRECT SHARES | ENDOWMENTS | AND MORE

ESTATE PLANNING

Will your dependants live comfortably if you pass away? It's not nice to talk about, but it's important to plan for. We and/or your accountant will help you calculate and plan around the financial impact on a family when the breadwinner is no longer with them. Life insurance, for example, is one of the most cost-effective ways to provide peace of mind.

INVESTMENTS | ASSURANCES | ASSETS | LIABILITIES | NEEDS PROVISIONS | AND MORE

RISK PLANNING

Will you and your family cope financially if you can't work anymore? Disability, dread disease and critical illness are an unfortunate reality. We'll help you find the appropriate cover to ensure that you and your family will be financially stable, if tragedy strikes, and a breadwinner can't earn an income.

LIFE COVER | INCOME PROTECTION | DISABILITY COVER | CRITICAL ILLNESS COVER | AND MORE

PRE-RETIREMENT PLANNING

Will you be financially independent when you retire? You don't want to live comfortably until retirement and then give it all up. During pre-retirement planning, we'll help you understand the income you'll need at retirement, based on your lifestyle, what you earn now, and what you could earn in the future. Then we'll invest what you need to enjoy the Golden Years.

RETIREMENT ANNUITIES | PRESERVATION FUNDS | PENSION FUNDS | PROVIDENT FUNDS | AND MORE

EMPLOYER & EMPLOYEE BENEFITS

How do you promote employee loyalty while protecting them and your business? Most of the South African population can't afford to retire. Risk benefits and retirement savings are an increasingly important responsibility, as they ensure that your people are taken care of and that you contribute to South Africa's economic stability. We'll act as strategic advisors to your business to help navigate your obligations to staff and we'll consistently ensure that your contributions buy the best and most appropriate benefits.

PENSION FUND | PROVIDENT FUND | LIFE STAGES | LIFE COVER | INCOME PROTECTION | CAPITAL DISABILITY | DREAD DISEASE | AND MORE

POST-RETIREMENT PLANNING

Where will your income come from after retirement? Your investments provide you and your dependants with an income, thanks to a combination of savings, the long-term growth of the investment, and the interest you could make from it for years to come. We'll help you find the most tax-effective way to invest your money to make sure you've saved enough to live comfortably.

LIVING ANNUITY | GUARANTEED ANNUITIES | AND MORE

MEDICAL AID

Do you, and your family, have the health cover you need if something goes wrong? Having a medical aid means that in this unfortunate situation, you know that your finances are taken care of. Medical aids offer a range of options, but not everyone can afford comprehensive cover, so a basic hospital plan is a great start. We'll help you find the most appropriate medical aid for your needs through our partnership with Discovery Health, Momentum Health and Fedhealth.

HOSPITAL PLANS | COMPREHENSIVE PLANS | MEDICAL SAVINGS | AND MORE

WE DON'T JUST CONSIDER ONE ASPECT OF WHO YOU ARE – WE LOOK AT THE BIG PICTURE.

BORTEFOLIO
BUREAU
PRIVATE WEALTH MANAGERS