Everest
WEALTH

SOLUTIONS SUMMARY

INVESTMENT PORTFOLIOS

STRATEGIC INCOME

A solution for clients requiring consistent monthly income, but no access to capital over a 5-year term.

- High, fixed, income yield
- Accumulated over 12 month period
- No capital volatility until redemption
- Fixed - year investment term
- Annually fixed dividend (reviewable annually) paid at maturity

- Private Equity | **5 YEARS**
- Target Dividend of 12.8% P.A
- 10%+ Special Dividend

STRATEGIC GROWTH

A solution for clients requiring a high and consistent capital growth, but no access to returns or capital over a 5-year term.

- High, fixed, accumulating yield
- Accumulated over 60 month period
- No capital volatility until redemption
- Fixed 5-year investment term
- Annually fixed dividend (reviewable annually) paid at maturity

- Private Equity | **5 YEARS**
- Target Dividend of 14.5% P.A
- Fixed Capital Value until Maturity

STRATEGIC USD INCOME (USD)

A solution for clients requiring consistent montlhy income. Capital fixed over a 5-year term as well as capital valued in ZAR, but returns linked to USD.

- High, fixed, income yield
- Accumulated over 12 month period
- No capital volatility until redemption
- Fixed 5 year investment term
- Capital valued in ZAR
- Income linked to USD
- Annually fixed dividend (reviewable annually) paid at maturity

- Private Equity | **5 YEARS**
- Target Dividend of 8% P.A
- Fixed Capital Value until Maturity

STRATEGIC GLOBAL PROPERTY (GBP)

A solution for clients requiring a high and consistent annual return. Capital fixed over a 5-year term as well as capital valued in ZAR, but returns linked to GBP.

- High, fixed, accumulating yield
- Accumulated over 12 month period
- No capital volatility until redemption
- Fixed 5-year investment term
- Capital valued in ZAR
- Returns linked to GBP
- Annually fixed dividend (reviewable annually) paid at maturity

- Private Property | **5 YEARS**
- Target Dividend of 8% P.A
- 10% Special Divided Target

WHAT MAKES **EVEREST WEALTH** UNIQUE ?

Everest Wealth differs from the traditional investment manager as we specialise in alternative asset classes, predominantly private equity. We realised a gap in the market multiple years ago where South Africa has an incredible opportunity through the private sector. The private sector in South Africa employees around 75% of the total workforce and has been playing a major part in our economy for decades.

We believe that through our use of alternative asset classes, we have developed an edge that can benefit investors:

1 DIVERSIFICATION

A client immediately benefits as they are allocated to an alternative, uncorrelated asset class - moving not with or against the market, but creating its own value trajectory.

2 TAX EFFICIENCY

Our investments are structured to deliver returns of profit in the form of a dividend, resulting in a fixed tax rate of 20% which allows clients to properly anticipate the tax consequences of investing.

3 ABOVE AVERAGE RETURNS

We as Everest Wealth take great pride in the fact that we have been able to produce double digit returns since our funds inception in May 2016.

4 CONSISTENT RETURNS

We emphasise consistency above all else. Clients requiring income and withdrawals, preserve far greater amounts of their capital when benefiting from consistent returns within a volatile market.

5 STRUCTURED COSTS

Consistency of return starts with a solid base. Investment charges have been structured into our solutions so that the returns you receive are based on full investment allocation - no investment charges are taken off of your investment returns or capital.

EVEREST WEALTH
GROUP STRUCTURE

Everest
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Everest ALTERNATIVE INVESTMENTS

A range of portfolio solutions offering a unique, tangible, and credible alternative investments that deviate from the traditional investment strategies. We focus on creating a sustainable environment around our products to promote consistency in our clients' portfolio rather than chasing higher, volatile returns.

Everest ADVISORY

In a world that is constantly evolving with multiple financial solutions for clients to choose from, it becomes critically important for Financial Advisors to act as specialists in the solution they propose to their clients. Let us assist you in understanding the difference between specialised advice and the broader market of independent product selection.

Everest INVEST

Our investing platform tailored to offer a range of financial products including pre-and-post retirement as well as voluntary investments. These products act as a home for our alternative portfolio solutions, where it will be appropriately administered through efficiency and a cost-effective structure.

Everest FIDUCIARY

Leaving behind a legacy starts with the personal administration of trusts, wills, and estates for clients. Transform your fiduciary needs into a unique bespoke solution.

Everest PROTECT

Securing a client's wealth and legacy requires appropriate protection of a client's assets. Clients should benefit from the value of an experienced team, sourcing the most suitable and cost-effective insurance solutions accompanied by thorough support and assistance. Protect your investments capital whilst gaining the wealth you desire.

STRATEGIC INCOME

AUM: R1 835 950 000
Growth: 12.8%

STRATEGIC GROWTH

AUM: R1 500 000 000 (Target)
Growth: 14.5% *Reviewable annually

STRATEGIC GLOBAL PROPERTY (GBP)

AUM: R1 500 000 000 (Target)
Growth: 8%

STRATEGIC USD INCOME (USD)

AUM: R114 510 000
Growth: 8%

Living Annuity

Endowment

LifeCycle
Sponsor for a broad host of South African pension funds

D and D the cycle
Administrator/Binder holder

27Four Life
Living Annuity Underwriter

Everest
WEALTH

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