Volume 20 AWARDS EDITION

PCH INSIGHT

PRIVATE CLIENT HOLDINGS

Private Client Holdings - Multiple Winners In The 2017 International Advisers Best Practice Awards

Private Client Holdings was selected as the overall Best Adviser Firm in South Africa at the 2017 International Advisers Best Practice Awards. In total PCH walked away with three awards, including Excellence in Professional Development; Excellence in Business Strategy; and the Best Performing Firm Overall in South Africa.

"Wealth managers have been witnessing unprecedented change in the industry – with customer expectations and demands, together with economic and regulatory reforms all throwing up new challenges, threats, and opportunities."

According to Andrew Ratcliffe, research shows that many wealth managers are taking the decision to develop more sustainable business models, with the aim being of giving their clients a more professional and consistent service experience.

"This recognition by the International Advisers Best Practice Awards is further evidence of our commitment to the financial well-being of the clients whom we serve."

"To be recognised as the company in South Africa that is leading the way in Best Practice in our sector is extremely exciting, and we are really pleased to have the hard work and dedication of our exceptional team and our company acknowledged," says Ratcliffe.

Private Client Holdings has now automatically been entered into the Overall Best Adviser Firm, up against companies in the United Kingdom, Europe, Hong Kong, Singapore and the Middle East.

The Directors Desk

Awards, mergers and more – a wrap up of a successful 2017

2017 has been a roller-coaster year with its ups and downs. The "downs" experienced have been on a macro level given our countries political upheavals. However, Private Client Holdings has had far more "ups" in what has been a successful and prosperous year for the company.

We were extremely pleased to be acknowledged as multiple winners in the 2017 International Advisers Best Practice Awards – walking away with the overall Best Adviser Firm in South Africa award, as well as an award for Excellence in Business Strategy and an award for Excellence in Professional Development for which I am particularly pleased.

Professional development is something we really believe in and focus upon, and we try to encourage a culture of learning and growth (please see Have You Heard section) within the company.

The fact that one of our wealth managers, Mark MacSymon, won the Financial Planning Institute's Financial Planner of the Year Award – a prestigious recognition indeed – is testimony to this. Congratulations Mark!

This award stress tests the quality and resilience of the financial plans prescribed by the wealth management team at Private Client Holdings and affirms that the company's strategies, operations, management and regulation compliance are all of the very highest standards.

Another exciting development for 2017 has seen Kirkman Lanfear, a firm of chartered accountants with a 46 year history and more than 75 years of experience, merge with Private Client Financial Services - further reinforcing the tax practice foundation that we are built on and improving our capacity and overall service offering to our clients.

We look forward to continuing to work hand in hand with our clients in the year ahead. May the festive season bring you an abundance of blessings and peace as you spend time with loved ones.

Grant Alexander

HAVE YOU HEARD?

PROFESSIONAL DEVELOPMENT FOCUS AT PCH

The PCH team really impressed us this year with their dedication to furthering their studies and growing professionally. Congratulations to **Luke Hirst** who completed his Professional Competency Examination to become a FPI CERTIFIED FINANCIAL PLANNER®; **Michelle van Wyk** CFP® who completed her Business Systems Analysis Certificate through UCT; **Michelle Hawson** who completed her Compliance Management Certificate through UCT; **Elmien Pols** who passed the Board Exam of the Fiduciary Institute of South Africa; and **Rafeeqa Peterson** who passed her Qualification in Administration of Deceased Estates.

We also have three team members currently studying for a Post-Graduate Diploma in Financial Planning; two doing a B.Com - one in Law and the other in Business Management - and others doing an Advanced Certificate in Financial Planning; a PostGraduate Diploma in Taxation; a VAT course, a Financial Planning NQF6 and a Bachelor of Accounting Science in Financial Accounting.

TEAM PCH UCT HAULS IN RESULTS AT THE CORONATION DOUBLE CENTURY

Conditions were near perfect for racing this year at the Coronation Double Century cycle race at which the Private Client Holdings Racing team did us proud, completing the gruelling 200km race in 4:51:46, finishing in 8th place overall.

Aside from the unique competitive nature of the racing element, the event is a favourite on the calendar for serious and social riders. The camaraderie, scenery and big endurance challenge is what draws us, with the post-race carnival atmosphere in town the perfect way to finish it off.

SANTA'S SHOEBOX INITIATIVE

The team from Kirkman Lanfear, who have joined the Private Client Financial division, have again supported the Santa's Shoebox initiative. The team put together over 50 Santa's Shoeboxes which will go to underprivileged children around Cape Town.

Mark MacSymon CFP® Wins Prestigious Financial Planner of the Year Award.

Mark MacSymon, a CERTIFIED FINANCIAL PLANNER® and Wealth Manager at Private Client Holdings, has been chosen as the winner of the 2017 FPI Financial Planner of the Year Awards.

> **"The FPI Financial Planner of the Year Award is the highest accolade a professional financial planner can obtain in South Africa."**

The award honours the top CFP® professional in the industry, and also recognises outstanding professional financial planners from across South Africa.

The competition consists of three intensive rounds during which entrants must first submit a detailed financial plan and a completed Business Assessment Tool; undergo a rigorous assessment for compliance, practice management and financial planning processes; and pass a panel interview which assesses the entrant's competency, practice management skills and knowledge of the wider financial planning industry.

Independent judges range from academics, industry experts and FPI board members who participate in evaluating a portfolio of evidence, and also conduct site visits and panel interviews with the candidates.

Mark, who graduated with a Masters of Commerce from the University of Stellenbosch, is a CERTIFIED FINANCIAL PLANNER®, and has completed the Advanced Post-Graduate Diploma in Financial Planning, achieved this impressive result through focus, determination and a lot of additional hard work. Mark says that winning this prestigious award would not have been possible if it were not for the vision and leadership of the Directors at Private Client Holdings.

> **"Private Client Holdings has provided me with an ideal platform with which to demonstrate and practice a world class financial planning philosophy."**

"I am extremely grateful to the founders of this business, Grant Alexander and Andrew Ratcliffe for making it possible," says Mark, who goes on to explain that being selected as the winner of the Financial Planner of the Year Competition is testimony in part to the unique value proposition provided by Private Client Holdings and the professionalism of the team that supports its vision.

"The financial planning experience that our clients receive is without doubt a world class service, administered by a team of like-minded professionals, whose mission to nurture the wealth of our private clients and their families is at the core of everything we do."

For more information or to contact Mark MacSymon CFP®, call Private Client Holdings on (021) 671 1220 or email Mark.MacSymon@privateclient.co.za.

Kirkman Lanfear merge with Private Client Financial

Kirkman Lanfear

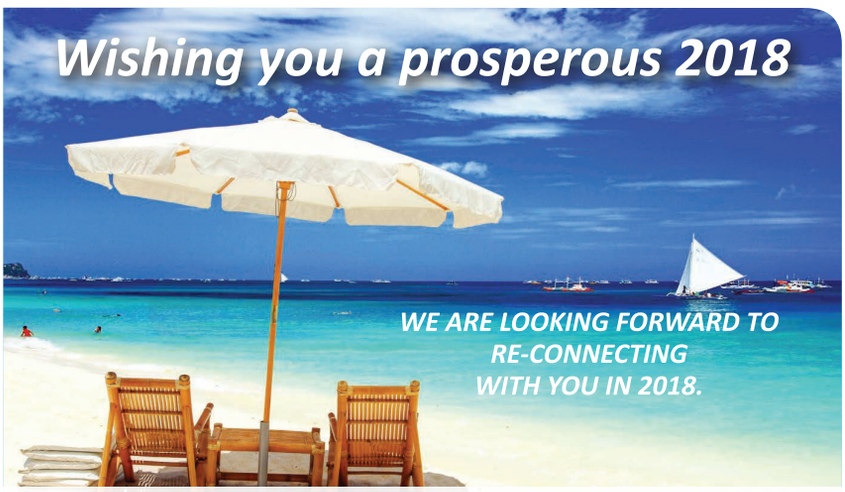
Private Client Holdings is excited to announce that Kirkman Lanfear, a firm of chartered accountants with a 46 year history and 75 years of experience, has merged with our Private Client Financial Services division - increasing our capacity and improving our financial services offering to our clients. We now have further support for our other divisions, particularly the wealth management and fiduciary departments.

It will be "business as usual" as far as the accounting and tax teams are concerned and we are delighted at the outstanding audit service we are now equipped to provide.

We would like to take this opportunity to welcome Claude Kirkman, the founder of Kirkman Lanfear and the partners; Guy Lanfear, Andrew Kirkman, Stephen Chapman, Daniël Marais and Greg Bunyard – and their support teams - who have become part of the Private Client Holdings family and are now based at our offices at 46 Main Rd Claremont. Our clients are further ensured exacting standards of service delivery through this new relationship.

AN INTRODUCTION TO PCH

The PCH team regularly holds client introductory events at various venues in and around Cape Town. These events are designed to personally unpack our service offerings whilst familiarising guests with our family office approach to wealth management and our client-centric focus. If you wish to add anyone to our next invitation list please let us know by contacting Michelle Hawson on michelle@privateclient.co.za.



Please note the PCH offices will be closed from 23rd December to the 3 January 2018 Please ensure that any instructions are communicated to us before or after this period.

WHO TO TALK TO

Our Private Client Holdings experts are available to field your questions. Don't hesitate to contact us for wealth management advice.

Portfolio Management
Grant Alexander
grant@privateclient.co.za

Wealth Management
Andrew Ratcliffe
andrew@privateclient.co.za

Financial Services
Jeremy Burman
jeremy@privateclient.co.za

Cash Management
Sian Murray
sian@privateclient.co.za

Risk Services
Trevor Meehan
trevor@phoenixrisk.co.za

Fiduciary Services
Sarah Love
sarah@privateclient.co.za

Seminar Enquiries
Michelle Hawson
michelle@privateclient.co.za

46 Main Road, Claremont, 7708
PO Box 24033, Claremont, 7735
Tel: +27 21 671 1220
Fax: +27 21 671 1149

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