



INTELLIDEX AWARDS ANNOUNCE SA's TOP PRIVATE BANKS AND WEALTH MANAGERS - AS VOTED FOR BY THE PUBLIC

Whilst the world of Wealth Management is not an episode of Survivor, the now famous statement “The Tribe Has Spoken” certainly rings true for this year’s annual Intellidex Top Private Banks & Wealth Managers Awards, which saw a record number of respondents taking part in the survey to vote for their preferred South African wealth management and private banking businesses - entrenching the credibility of the results.

This year’s awards saw Family Office and Goals-Based Wealth Management company, Private Client Holdings (PCH), walk away with the overall Top Wealth Manager award in the boutique category. PCH also won the Young Professional Archetype award and came third in the Passive Lump Sum Investor, as well as the Successful Entrepreneur Archetype categories – with the organisations clients rating the quality of service and advice received as “excellent” – with scores of 86% and 80%, respectively.

Private Client Holdings also placed second in the People Choice award, which is based solely on confidential client feedback gathered in an online survey. A PCH client said: “Private Client Holdings are really thorough, and I trust them completely in every aspect.”

Internationally, the concept of a Family Office is by no means a new idea. In South Africa Private Client Holdings (being no strangers to accolades - having won several top Intellidex awards in 2019) is taking the lead when it comes to providing high net worth individuals and their families with an all-inclusive financial solution. The organisation offers a forward-thinking service which is made up of six specialist pillars. While each unit concentrates on a different aspect of wealth management, they also work together as a group to deliver a cohesive and in-depth Family Office solution. PCH’s services include wealth and asset management, tax, accounting, cash, risk and fiduciary services. The company has a long track record of strong and steady performance, which has inspired confidence amongst investors and elevated it above the competition – allowing them to win these awards.

The Intellidex Top Private Banks & Wealth Managers Awards, now in their 10th year, are based on a comprehensive survey of both clients and participants in the industry and are designed to benchmark companies in the South African wealth management and private



banking sector. First launched in 2012, the Intellidex nomination process has two main elements; the first is a questionnaire that the company completes, and the second is an anonymous online client survey which assesses the different strengths and weaknesses of the private banks and wealth managers.

Grant Alexander, director of Private Client Holdings says that being recognised once again in the Intellidex Top Private Banks and Wealth Managers Awards is exceptionally rewarding. “2020 truly was a disruptive year due to the ongoing Covid-19 pandemic. At PCH we have carried the lessons learnt into this year, approaching our roles with adaptability, agility and mindfulness. We are pleased to have the hard work and dedication of our exceptional team and our company recognised by our valued clients and by the Intellidex judges. Private Client Holdings continues to be recognized as a champion of best practices with investment strategies that deliver consistent outcomes over time – and our track record has inspired confidence amongst our private clients.”

Private Client Holdings director Andrew Ratcliffe says that this recognition by the Intellidex Top Private Banks and Wealth Managers Awards is evidence of Private Client Holdings’ ongoing and determined commitment to the financial well-being of their clients. “Covid-19 has changed just about everything, but in the wealth management space, tried and trusted principles still apply. Our continued growth and the number of our clients who use most of our six wealth management service pillars is a reflection of the market being willing to embrace our holistic wealth management offering.”

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About Private Client Holdings

Private Client Holdings was founded as a corporate tax consultancy in Cape Town, South Africa in 1990. Since then, the company has developed into a full spectrum Asset and Wealth Management Company and multi-Family Office with six specialist divisions: Wealth Management, Portfolio Management, Financial Services, Fiduciary Services, Cash Management and Risk Management.

Private Client Holdings (PCH) are taking the lead in Southern Africa when it comes to providing high net worth families with an all-inclusive wealth management solution and recently secured 2nd position overall in the TOP WEALTH MANAGER: BOUTIQUES in the



INTELLIDEX TOP PRIVATE BANKS & WEALTH MANAGERS AWARDS 2019. They also placed 3rd in the Passive Lump-sum Investor award and 2nd in the Successful Entrepreneur award. The award they are most proud of is placing 2nd in the People's Choice Award - an award based purely on feedback from a confidential client survey.

Private Client Portfolios, the Portfolio Management arm of Private Client Holdings has been awarded the title of "Best Investment Advisory Team – South Africa 2019" in the Capital Finance International Award – this London based CFI.co awards programme identifies individuals and organisations worldwide that truly add value through best practice within their industry.



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