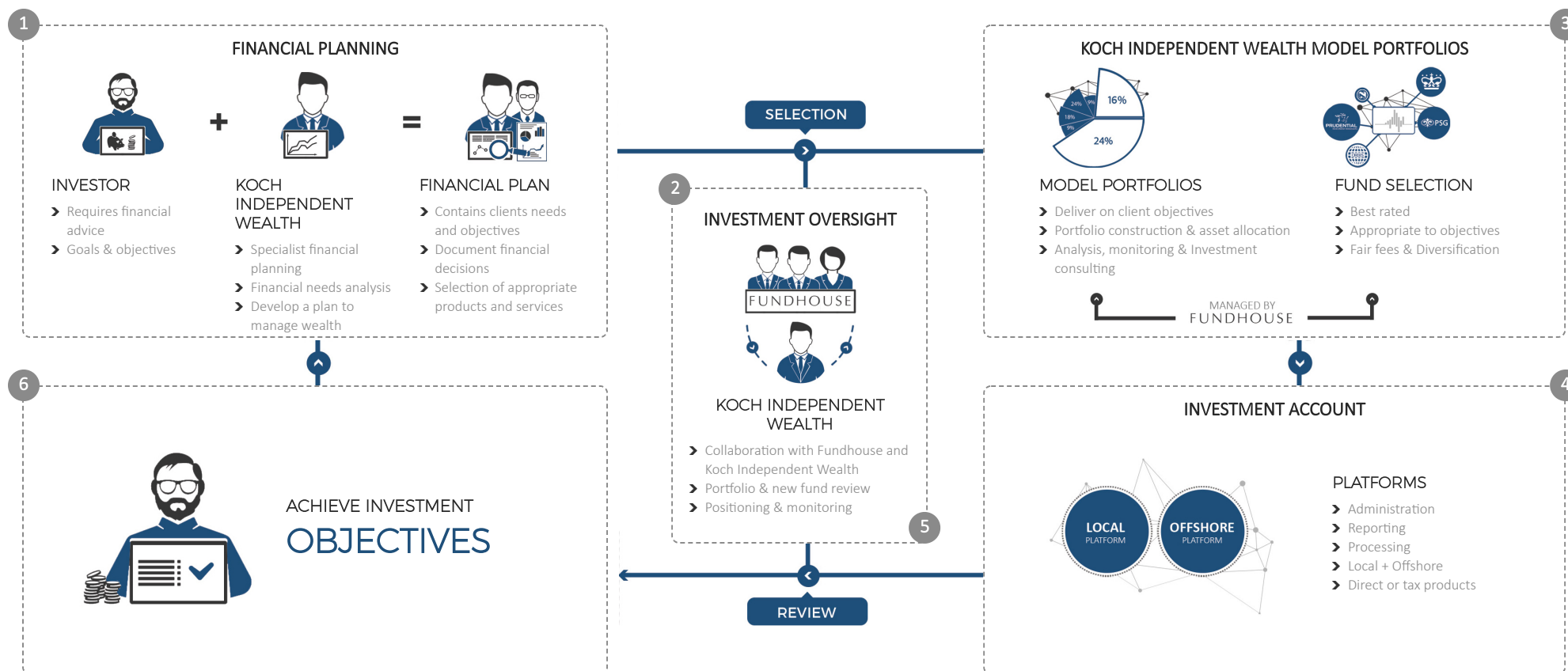


Koch Independent Wealth

OUR INVESTMENT VALUE PROPOSITION

- ⊙ Independent best advice is the cornerstone of our service offering
- ⊙ Fully supported investment process in partnership with Fundhouse
- ⊙ Full range of managed investment options available to clients in the form of 'Model Portfolios' (Managed Accounts)
- ⊙ Local and Offshore denominated investments
- ⊙ We support both active and passive investing
- ⊙ Choice of platform: Allan Gray, Allan Gray Life Guernsey, Canaccord, Momentum OS, Ninety One
- ⊙ Competitive total cost to client – 'value for money' principle

HOW WE IMPLEMENT INVESTMENT ADVICE



FUND RESEARCH & DUE DILIGENCE

Fundhouse undertakes in depth, qualitative fund research for all funds considered for selection across the range of solutions. The Fundhouse research capability has extensive experience within the asset management industry and is uniquely equipped to evaluate the quality and capability of local and offshore investment managers. Fundhouse selects funds on merit to be used across the range of model portfolios, where the fund has exhibited the following traits:



Based on the range of funds covered to date, the minority make it through a full review by the Fundhouse research process. These select few are considered for Koch Independent Wealth portfolios. In order to accurately and objectively assess each fund, Fundhouse follows a structured framework to evaluate funds, each of which takes a minimum of 50 hours upfront, with ongoing monitoring and annual reviews with the managers in question.



FUND COVERAGE:

- 🎯 Local and offshore
- 🎯 Equity, fixed income, multi-asset, alternative, property
- 🎯 Multiple investment styles to suit individual requirements
- 🎯 Active & passive funds

RESEARCH & INVESTMENT TEAM

The Fundhouse team has extensive experience in asset management, the evaluation of fund managers, portfolio construction and asset allocation. This experience is essential in being able to make judgements on individual funds, and to be able to identify the particular traits and ultimate performance outcomes for clients. Koch Independent Wealth has open access to the Fundhouse team to ensure that all investment advice provided to clients has been tested as far as possible by using comprehensive and objective fund research.

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