pps
FOR PROFESSIONALS
SINCE 1941

WEALTH ADVISORY

PPS WEALTH ADVISORY

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Boutique wealth distribution channel exclusively for high net worth graduate professionals

Anchored in over 70 years of mutuality, with a deep understanding of what graduate professionals expect. Track record of managing complex financial portfolios

Accelerating wealth opportunities

High net worth professionals seeking to create, protect and grow personal, family and business legacy

SA WEALTH MARKET SIZE

USD 649 billion – private wealth in SA

39 200 – South Africans with net assets of **USD 1 million +**

2 070 – South Africans with net assets of **USD 10 million +**

Source: AfriAsia Bank South Africa Wealth Report 2019

51,000 South Africans are members of the top **1%** of global wealth holders

Source: Credit Suisse Global Wealth Report 2019

SA POSTGRADUATE PROFESSIONALS

Wealth segment

USD 216 billion

13 067 – South African post graduate professionals with **USD 1 million+** net assets

690 – South African post grad professionals with **USD 10 million +**

Source: New World Wealth

PROFESSIONS

28%	**Law** (LLB, LLM)	5%	**Computers** and IT
19%	**Finance & Economics** (MBA, BCom, Business **Science, CFA)**	4%	**Engineering**
10%	**Accounting** (Chartered Accountant)	3%	**Actuarial**
7%	**Medicine & Science**	24%	**Other**

Source: New World Wealth (2018) Refers to last degree/certification achieved by HNWI

PPS WEALTH ADVISORY

Exclusively for graduate professionals with honours level*/ equivalent or higher qualification, from a public institution or certain listed private institutions, with;

R5-million in net investable assets

R2 million in personal income

R3 million in accessible finance

Equity

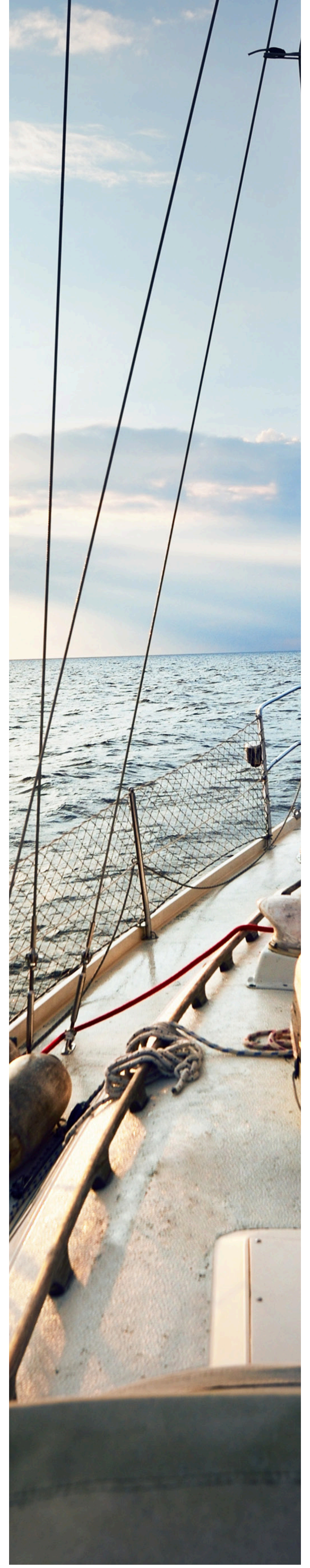
Property holdings (excluding primary residence)

Inheritance

*honours level equivalent qualification includes certain BTechs, 3-year undergraduate degrees or diplomas plus a postgraduate qualification or professional designation.

Mzwandile Mtshali,
Executive PPS Advisory Services and Enablement

"PPS's unique ethos of mutuality and our position as a premium brand providing intelligent financialsolutions exclusively for graduate professionals inthe boutique wealth market. differentiates PPS inthe boutique wealth market."



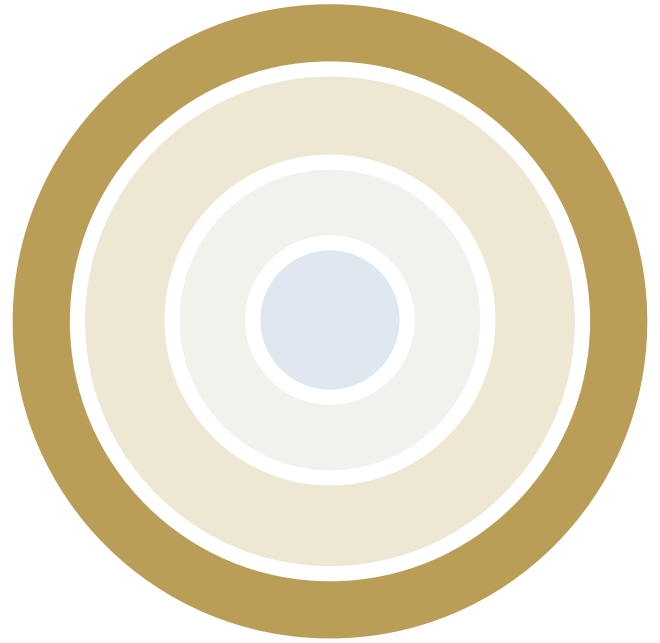
SERVICES AND SOLUTIONS

Advice-led **strategic financial plans**

Single point of contact – your wealth manager – to make your aspirations and goals a reality

Seamless service integration

RELATIONSHIP MODEL



Qualifying high net worth **graduate professional**

Wealth Manager Relationship and single point of contact

Personalised **specialist services**

Bespoke solutions basket

STRATEGY

Protect, create and accelerate wealth for high net worth members

Established professionals

Senior professionals

Retired professionals

International standards applied locally

MEET THE TEAM

High-quality advice led wealth management

Qualified professionals with CFP

Tenures between **5 to 20 years**

LINDA SHERLOCK CFP®

Executive Head: Wealth and Business Development

Joined PPS in March 2019

Extensive experience in financial services industry spanning **32 years**

Previously a **Director at Alexander Forbes Fiduciary Services**

Served on the Retail Executive Committee as **Head of Advisory and Managing Executive of Business and Distribution Enablement**

An **executive committee member of Group Client Solutions** representing the Retail division in product and advice

Member of **Financial Planning Institute**

Married with two children

When Linda grows up, she wants to teach in disadvantaged communities

Wealth Protection
Protecting what's important to you

Wealth Creation
Helping you create the future you desire

Wealth Acceleration
Helping you grow what you have worked so hard to achieve

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Wealth Protection | Wealth Creation | Wealth Acceleration