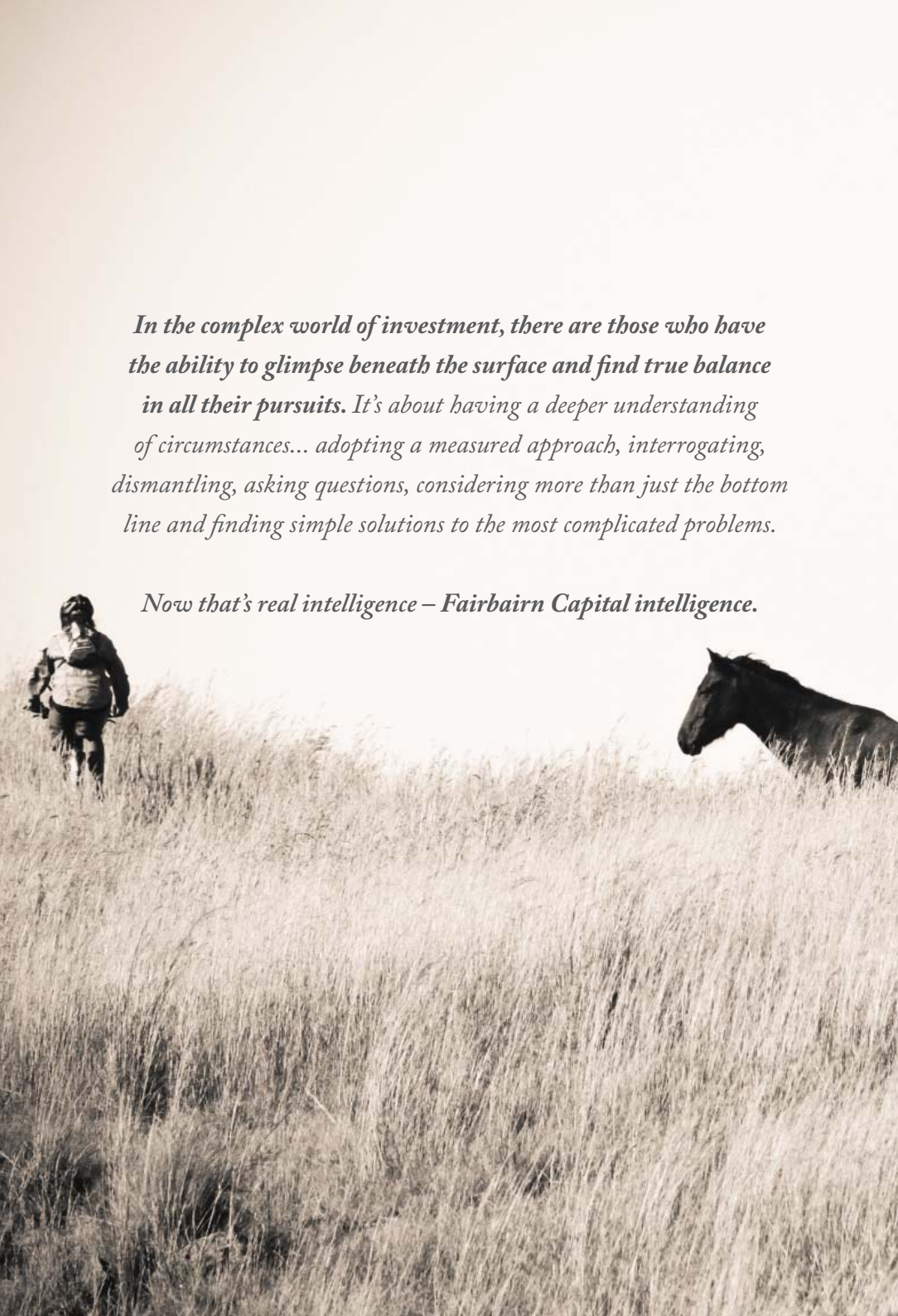


ELITE REASONING

# ELITE KEY SELLING POINTS





*In the complex world of investment, there are those who have the ability to glimpse beneath the surface and find true balance in all their pursuits. It's about having a deeper understanding of circumstances... adopting a measured approach, interrogating, dismantling, asking questions, considering more than just the bottom line and finding simple solutions to the most complicated problems.*

*Now that's real intelligence – Fairbairn Capital intelligence.*

## KEY SELLING POINTS

Whatever your client's investment objectives, the Elite range of funds, together with your advice, can offer all the features required of a truly elite offering. Below are just a few of the key features:

- Investment made easy – a unique investment modelling tool matching your client's investment objectives with specifically chosen funds.
- Rewards premium clients and long-term investors through a unique bonus system.
- Around 40 – 50 funds selected using stringent criteria and independent research.
- Market-leading support services.
- Adviser access to the elite, independent research of Fairbairn Capital Investment Intelligence, including:
  - weekly market and economic summaries to keep you informed;
  - quarterly house view giving you insight into the last quarter and what to expect in the next quarter;
  - quarterly quantitative assessment of the funds within the Elite range;
  - a knowledge bank to facilitate knowledge sharing; and
  - fund and investment related articles addressing topical investment, market or economic related issues.

### Competitive pricing structure

The Elite range offers an easy to understand, single charging structure which provides real value for money to your clients. Plus you can now offer bonuses back to your clients in the form of:

- Investment Size Bonus – rewards your client based on the investment size in the Elite range
- Investment Duration Bonus – rewards your client for maintaining their investment within the Elite range
- Adviser Fee Discount – flexibility in negotiating ongoing advice fees with your client and the ability to pass any fee discount on to your client's portfolio

### Tax efficiency

The Elite range provides enhanced tax efficiency through its all-in-fee structure. Fees are deducted from the underlying returns before distributions are declared, ensuring optimum use of your client's money by reducing the taxable amount.

### Investment modelling tool

An easy to use tool that takes into account your client's investment objectives and matches them to:

- the appropriate solution funds; or
- the relevant building block funds through an asset allocation tool.

### Access to support services

You and your client gain access to elite services such as:

- Fairbairn Capital Service Centre with consultants specifically trained on this product suite; and
- fairbairncapital.com website with its elite online modelling tool, advanced reporting system, personalised fund graphing, client calendar, transactional statements and more.

### Unique fund offering

The Elite range includes funds that are new in the market place and that can only be accessed via Fairbairn Capital.

### Fairbairn Capital Investment Intelligence

Clients and advisers have access to this elite independent research unit that utilises its extensive expertise to deliver quarterly quantitative assessment of the funds in the Elite range, market and economic commentary, and that generally shares knowledge in order to ensure you and your clients are in a position to make informed decisions around portfolio choice.

To invest, speak to your Old Mutual financial adviser,  
your broker or phone 0860 WEALTH (0860 932 584)  
or email [advice@oldmutual.com](mailto:advice@oldmutual.com)

[www.fairbairncapital.com](http://www.fairbairncapital.com)

Please note: The opinions expressed in this brochure are not intended to serve as investment advice and should not be used in substitution for the exercise of own judgement.



Fairbairn Capital is an elite service offering brought to you by Old Mutual Investment Services (Pty) Ltd and Old Mutual Life Assurance Company (South Africa) Ltd, Licensed Financial Services Providers.