

BODY CORPORATE SOLUTIONS



# BODY CORPORATE SOLUTIONS



We offer comprehensive solutions for body corporates to meet their sectional title obligations while assisting in compliance with South African tax regulations.

- Professionalize the investment of funds to ultimately optimize returns.
- Meeting liquidity and risk requirements.
- Fees and costs considered
- Offer capital guarantees to protect funds from capital losses.
- Offer complete transparency to the underlying investments.
- Simplify the process and simplify your investments into a single account.





# **OPTIMIZE THE RETURNS**

- Bank or money market return rates
- No analysis to underlying investments

#### Solution

- o Set investment strategy for body corporates across all funding mechanisms
- o Understand body corporate requirements for projects and funding requirements
- o Invest within each environment to optimise the needs / benefits

# LIQUIDITY, RISK AND COST

- Liquidity not considered
- Bucket risk profiling
- Monthly and transaction costs for no added value

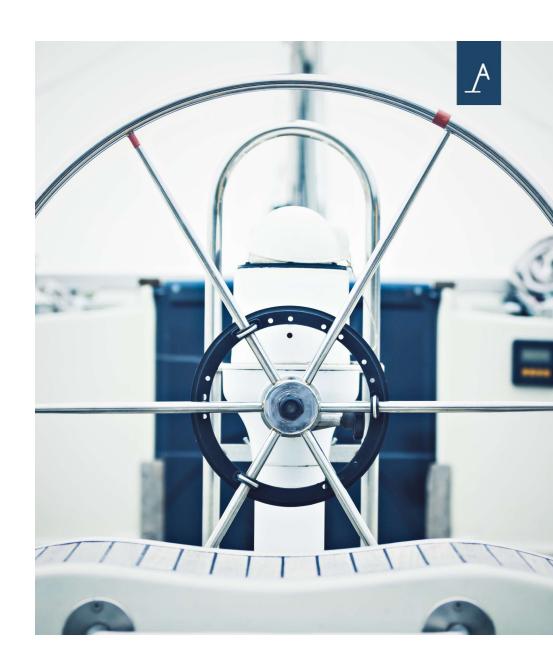
#### Solution

- o Understand body corporate liquidity requirements and customise solution
- o Take into account specific risk profile and allocate funds to appropriate investments
- o Optimise the cost via platforms and investment solutions



#### **OTHER BENEFITS**

- Consolidated Reporting
  - Report across multiple asset managers and underlying investments
- Open up investment accounts
  - Swap from bank accounts to investment accounts
- General support services
  - FICA compliance
  - Consistent communication
  - Direct relationship with wealth manager
  - Online support





## **BODY CORPORATE FICA REQUIREMENTS**

We will need the following FICA if you want to open an account for the body corporates:

- Copy of the Letter of Incorporation showing all board members OR minutes of the last AGM showing all board members
- Organogram in the registered name of the body corporate, including all members and ID numbers showing the structure
- Proof of Bank (Bank statement, Bank confirmation letter etc) in the name of the Body Corporate
- Proof of Residence (Utility bill, Statement, Lease etc) in the name of the Body Corporate
- Proof of Tax (any official SARS document with your SA tax number) in the name of the Body Corporate
- Copy of I.D and Proof of Residence for each board member of the Body Corporate
- Copy of I.D, Proof of Residence and Proof of Tax for the Authorised Person who is appointed to sign on behalf of the Body Corporate
- Signed resolution to appoint the authorised person

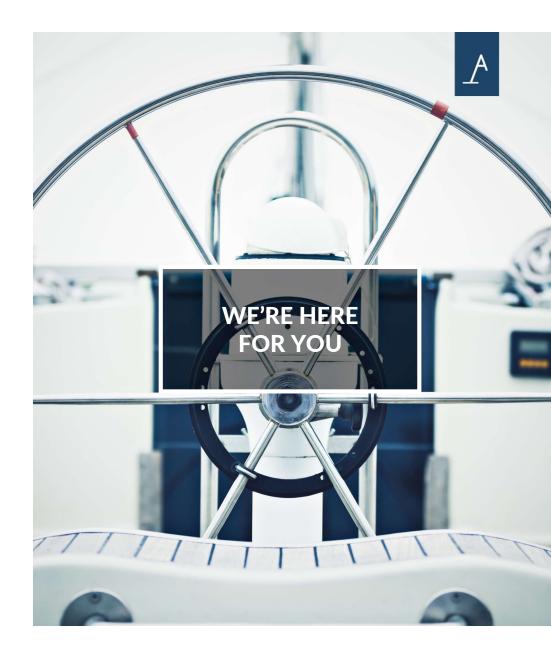
# **YOUR TEAM AT ANCHOR**



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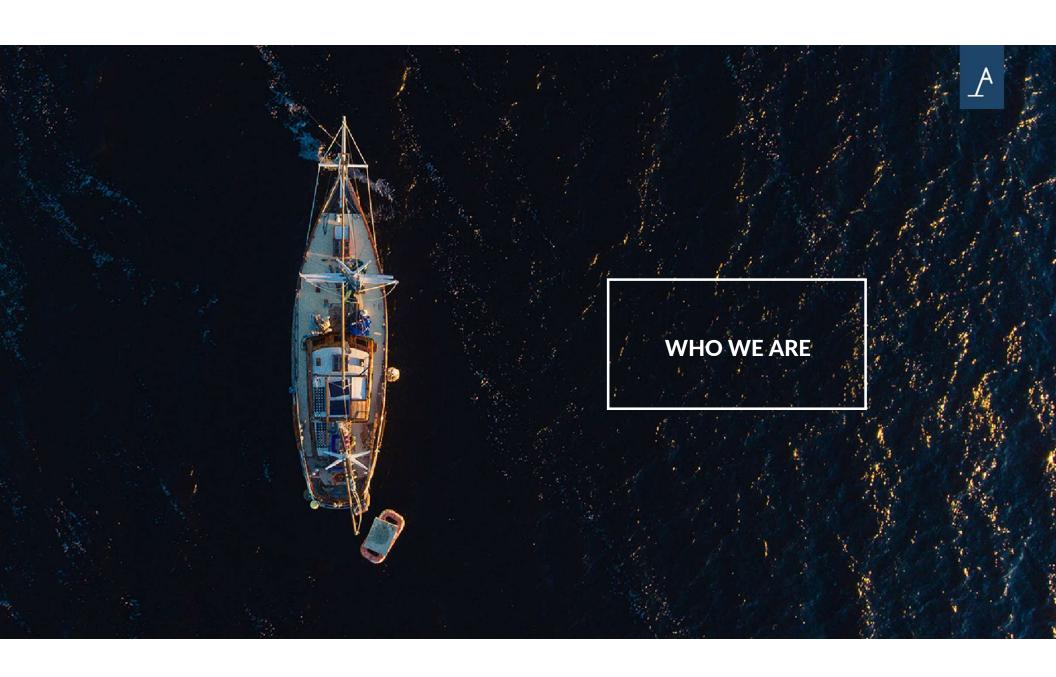


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A

**ANCHOR GROUP** 





#### **ANCHOR CORE BUSINESSES**

#### **ANCHOR IS AN ENTREPRENEURIAL**

#### **WEALTH AND ASSET** MANAGEMENT BUSINESS

with an absolute focus on the two most important parts of our business:





**INVESTMENT PROCESS** 



270+ STAFF ACROSS GROUP







COMPLETE LOCAL AND GLOBAL PRODUCT AND **SERVICE OFFERING:** 

> UNIT **TRUSTS**

HEDGE **FUNDS**  **SEGREGATED MANDATES** 

#### **INTERNATIONAL FOOTPRINT:**









- SOUTH AFRICA

**MAURITIUS** 

- **FLORIDA**

LONDON

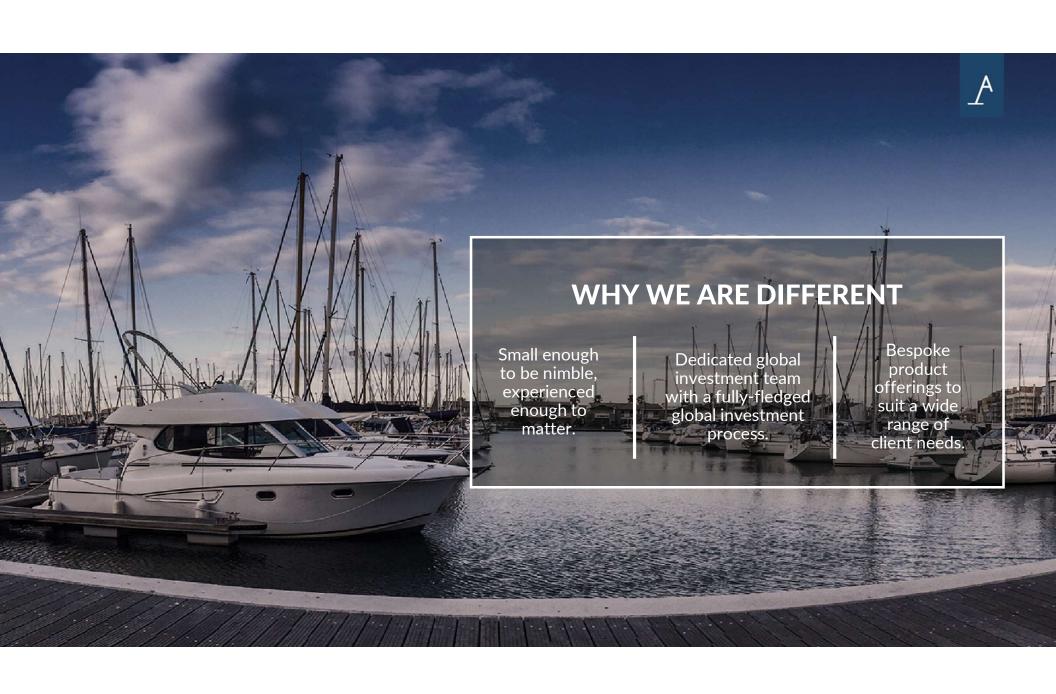
- ANCHOR ASSET MANAGEMENT
- ANCHOR PRIVATE CLIENTS
- STOCKBROKING

MANAGEMENT AND ADVICE

R16 billion **INVESTED DIRECTLY OFFSHORE** 

**R21** billion

INVESTED OFFSHORE FROM SOUTH AFRICA





# WHY ANCHOR

# WORLD CLASS INVESTMENT TEAM

A highly qualified and experienced team of more than 20 investment professionals, running local and global investment processes.

## LOCAL AND OFFSHORE INVESTMENT SOLUTIONS

Anchor runs dedicated local and global investment processes, which produce a range of local and global investment solutions.

## PRODUCTS ACROSS THE RISK SPECTRUM

A world-class investment product range, across asset classes and geographies.

### OBSESSED WITH CLIENT SERVICE

We exist for and because of our clients.

# AN ENTREPRENEURIAL CULTURE

From the products and solutions we create to the way we align stakeholder interests, we're entrepreneurial at heart.



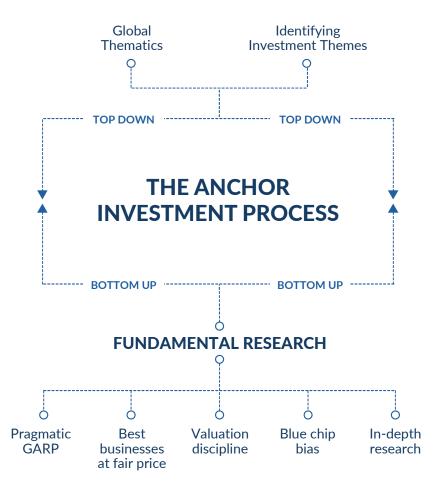


## INVESTMENT TEAM, PHILOSOPHY AND PROCESS



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# A FULLY FLEDGED INVESTMENT TEAM





# PETER ARMITAGE & NOLAN WAPENAAR

CO-CIO

Peter and Nolan lead a highly-skilled team of investment professionals



























#### A DYNAMIC INVESTMENT PROCESS LED BY HIGH QUALITY, EXPERIENCED INVESTMENT PROFESSIONALS





Fully fledged team across all asset classes.



Fund and portfolio managers take ultimate responsibility, with input from the team.



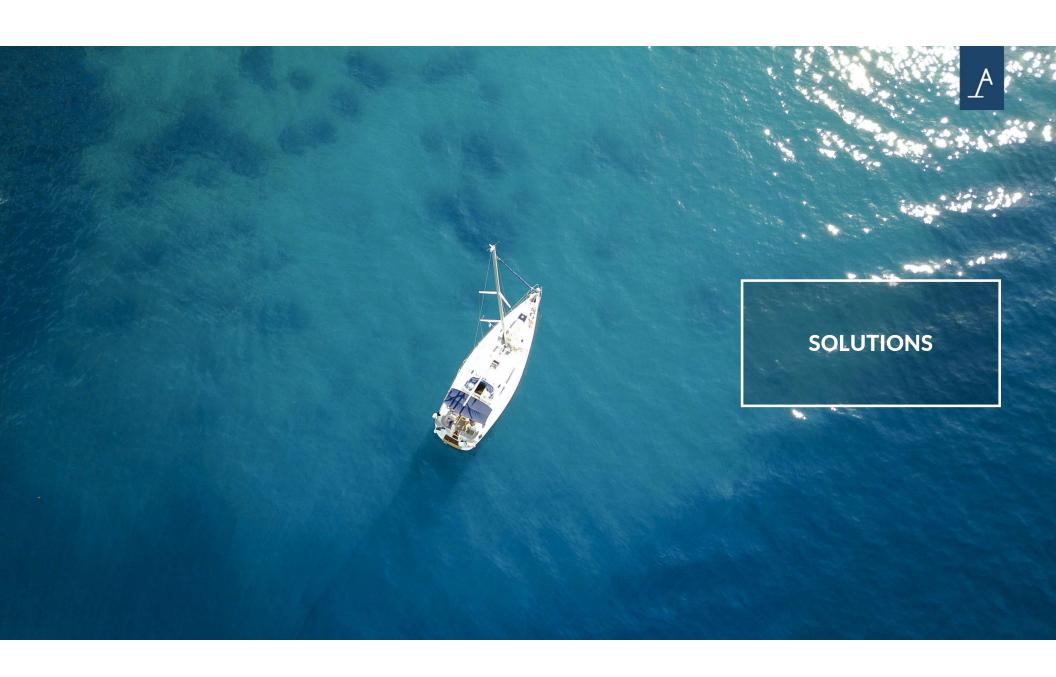
Weekly formal investment process meetings.



Informal daily investment meetings.



Close-proximity
working
environment
facilitating
communication
and decision
making.





# A FULL RANGE OF WEALTH & ASSET MANAGEMENT PRODUCTS & SERVICES

#### PRODUCTS ACROSS THE RISK SPECTRUM

A world-class investment product range, across asset classes and geographies, from which a diverse range of client needs can be met.

#### PRODUCTS AND SERVICES:

Local and global solutions

Unit trusts

Hedge funds

Share portfolios

Structures

Tax-efficient solutions

COMPLETE PRODUCT AND SERVICE OFFERING

LOCAL & OFFSHORE CIS ACROSS ASSET CLASSES HEDGE FUNDS SEGREGATED MANDATES

#### **LOCAL**



Share portfolios



**Unit Trusts** 



Structured Notes



Zero-tax rated endowment via Hollard



Personal hedge fund or unit trust

#### **OFFSHORE**



Share portfolios



**Unit Trusts** 



Life Assurance Wrappers



Offshore Trusts

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References to market or composite indices (each an "Index" and together the "Indices") of relative market performance over a specified period of time are provided for your information only. Reference to an Index does not imply that a Fund's portfolio will achieve returns, volatility or other results similar to the Index. There are significant differences between a Fund's investments and the Indices. For instance, a Fund may use short sales and leverage and may invest in securities that have a greater degree of risk and volatility, as well as less liquidity, than those securities contained in the Indices.

Moreover, the Indices reflect the reinvestment of income or dividends and are not subject to any of the management fees or other expenses that the applicable Fund must pay. It should not be assumed that such Fund will invest in any specific securities that comprise the Indices compared to such Fund herein, nor should it be understood to mean that there is a correlation between the Fund's returns and the Indices' performance. Past performance is not necessarily indicative of or a guarantee of future results. There can be no assurance that any Fund will realize returns comparable to those achieved by Musgrave Capital, or the principals of Musgrave Capital, in the past. An investment in a Fund is speculative and entails substantial risks. Legal, tax and regulatory changes could occur during the term of the Funds that may adversely affect performance.

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