

## About Us

Sabre Wealth Management is committed to bringing a new era of financial services to South African based professionals. The individual circumstances of our clients with respect to their mobility and specific attitudes require niche planning.

Our focus is on helping you earn, save and invest your money, onshore and offshore, as efficiently as possible. We believe that our skills are uniquely positioned to cater for this.

### What can we do for you?

- **Tailor a low cost diversified investment portfolio around your specific needs.** Incorporating a diversified set of assets classes (equity, bonds, property, hedge funds, commodities etc).
- **Provide currency solutions for offshore investments,** through the use of personal allowances and the facilitation of money transfers.
- **Structuring offshore portfolios,** researching the various products and implementing a unique offshore portfolio to meet your risk needs.
- **Help 'International Individuals' structure their finances** to make full use of allowances in the various tax regions
- **Asset structuring for those relocating overseas,** particularly if intending to leave savings/investments in the South Africa.
- **Source mortgages for South Africans in the UK and abroad.** We have expertise in sourcing properties and mortgages for foreigners with unusual cases.
- **Assess your individual insurance cover needs,** taking into consideration cost, flexibility and mobility.
- **Planning for your retirement** with a sound investment plan to meet your lifestyle goals and future needs.
- **Structure your estate for legacy planning,** creating/updating your Will, decreasing estate duty and executor fees, where possible.
- **Create a full financial plan** covering your short, medium and long term requirements.



## About our products & services

### Investments

Sabre provides investment advice across the spectrum, from pension planning to short term banking. We believe that superior long term returns are driven through asset

allocation, eliminating tax, reducing costs and expertise in product solution.

- **Portfolio Planning.** Using portfolio tools we will create an efficient risk/return portfolio and select specific funds to maximise returns. In addition we use fund supermarkets, to reduce the cost of the portfolio, feeding back most of the upfront fees to you.
- **Funds.** We select investments from a broad range of products spanning the asset classes including equity funds, bond funds, property funds and hedge funds.
- **Pensions.** One of the most tax effective ways of building an investment portfolio for the long term is via a Retirement Annuity in South Africa. We create investment portfolios within a pension product which will suit your flexibility, investment and cost profile. During the process, we will ensure that you understand all the investment risks needed to achieve the required return

### Offshore portfolios and currency solutions

South Africa contributes 0.8% to the global economy, making offshore exposure a fundamental part of any individuals portfolio.

Sabre specializes in the setup of fully offshore portfolios, whilst facilitating the actual foreign exchange transfer,

both out of South Africa and abroad. Benefits of an offshore portfolio include:

- Exposure to a wide range of currencies
- Geographic spread, investing in different countries at different stages in their growth cycles
- Increased investment opportunities, industries and economies, diversifying your investment risk
- Rand hedge, with investments in foreign currencies that offset any decline in the values of the rand (and therefore the value of your local investments).

### Life, Protection, Health and General Insurance

Risk protection is the area of financial planning that is designed to protect you against unforeseeable eventualities in the future, including death, disability, severe illness and health ailments. While you are still accumulating your wealth, repaying your home loan and saving for your retirement years, your most valuable asset is your ability to generate an income.

Unforeseeable eventualities have the ability to cause huge financial losses, and we believe that these risks can be effectively protected against through insurance, which is an integral part of your overall financial plan. We advise on all the major insurance areas including: life cover, disability cover, private medical cover and general insurance.

Sabre Wealth Management is authorised and regulated by the Financial Services Board Authorised Financial Service Provider. License no: 35134



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