The wealth planning process

The process we go through with you as an Edenhurst client is an invaluable opportunity for you to clarify your objectives with regards to your wealth, how you want to maintain and enhance it during your lifetime and, in the longer term, what plans you wish to make for its transfer to your beneficiaries.

STEP 1 — Getting to know you

The process provides us with a clear understanding of your objectives, which will be reviewed at regular intervals. It also enables us to create the tailor-made solutions that match your requirements, ambitions and needs.

STEP 2 — Assessing the most suitable solution

We will develop a comprehensive wealth management strategy, fully evaluated for implications across disciplines and jurisdictions, to ensure your financial, investment, estate planning and business requirements are addressed.

STEP 3 — Execution

We will take responsibility for all applications and paperwork, ensuring that the required timescales are strictly adhered to, and that everything flows as smoothly as possible.

STEP 4 — Monitoring

It is essential to understand that investments are a long-term process. We constantly monitor and review the quality of service you are receiving and the performance of your investment strategy.

Investing with Edenhurst

Our investment approach is conservative yet modern which allows us to take advantage of emerging trends. We believe in investing with an open mind, by utilising dynamic strategies which meet today's varying market demands. However, we tend to choose tested and practical solutions for our clients.

Every solution caters to your unique needs, as no two clients are ever alike.

Whether we are helping you place cash in a suitable bank, advising on bio-tech venture opportunities, or executing niche real estate transactions, we can provide you with that specific advice.

No matter the scale or kind of transaction, from a pre-IPO venture to a real estate bridge financing deal, we have distinctive access to the most attractive and latest investment opportunities on the market.

WE EXECUTE, ADVISE AND MANAGE:

Financial Markets

- Equities
  - *— Global Companies*
- Fixed Income
  - *— Government & Corporate Bonds*
- Structured Notes
  - *— Hybrid Securities*

Specialist

- Venture Capital
  - *— Bio-tech*
  - *— High-tech*
  - *— Services & Cloud*
- Private Equity
- Joint Ventures

Real Estate

- Residential
- Commercial
- Bridge Finance

Cash Management

- Banking & Deposits
- Foreign Exchange (FX)
- Diversified Allocation

Confidentiality is fundamental to the way we do business and essential to the establishment of long-term relationships with our clients. You can also be confident that we have no conflicts of interest and, as a result, our advice is always completely transparent and in your best interests. Our priority is always to ensure that your assets are held as effectively as possible, both now and for future generations.