

# International Family Office Summit

Cape Town  
20 – 22 May 2025



ZAINA  
WEALTH MANAGEMENT

## Brief History

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Worked as Offshore consultant for Fedsure/Irish Life International/Investec.

Founded Business in 2001 as a Offshore Investment Specialist with 11 clients.

Have 50 families mostly CT & JHB resident, also UK and Mauritius.

15 High-net worth families with portfolio's that we manage above \$1m.



## Brief History

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Category 1 FSP - non-discretionary .

Advisory and implementation on Collective Investments, Shares, Bonds, Hedge Funds, and Structured Notes and Bank Deposits.

Sister Company ST Paul's Financial Services - Foreign Exchange Dealer to purchase forex for clients.



## Skill –set

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Solid understanding of the offshore investment terrain

In terms of what's available to an investor

Able to tailor a solution that works for the client

Experience with offshore unit trusts (Fundsmith, Schroders, Templeton, Ranmore, NinetyOne etc) also investing in hard currency bonds and buy-and-hold foreign listed equity positions.

Mostly use SA based offshore platform and Channel Island or Swiss Custodian for large portfolio's



# For Family Office

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WHAT DOES YOUR FAMILY OFFICE SPECIFICALLY NEED AND EXPECT FROM AN ASSET MANAGER / INVESTMENT ADVISOR / PORTFOLIO MANAGER? WHAT ARE THE GAPS IN-HOUSE, IF ANY?

WHAT SET OF UNIQUE COMPETENCIES DO YOU IDEALLY WANT FROM YOUR INVESTMENT PROFESSIONAL

HOW DOES YOUR CLIENT OR FAMILY OFFICE ENGAGE WITH INVESTMENT PROFESSIONALS? HOW ENGAGING DO YOU NEED THEM TO BE?



# Investment Basics

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TRADITIONAL INVESTMENT “VEHICLES” – UNIT TRUSTS, FUNDS, ETFs,  
BESPOKE PORTFOLIO’S, SEGREGATED PORTFOLIO’S , ...STRUCTURED  
NOTES

WHAT’S INSIDE YOUR INVESTMENT?



# Investment Basics

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KEEPING IT SIMPLE

NOT GETTING (TOO) CLEVER

AT THE END OF THE DAY, IT'S WHAT WORKS FOR **YOUR** CLIENT OR FAMILY OFFICE, WHAT THEY UNDERSTAND AND ARE COMFORTABLE WITH.



# Reporting that is Meaningful

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ASSESSING PERFORMANCE

BEING AWARE OF ASSET CLASS ALLOCATIONS

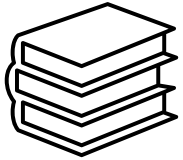
CURRENCIES, GEOGRAPHIC AND SECTOR EXPOSURE





# INVESTMENT PRINCIPLES

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INVESTMENT COSTS AND CHARGES

DIVERSIFICATION

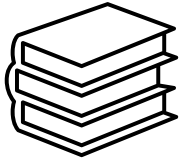
COMPOUNDING AND TIME

REVERSION TO THE MEAN



# CASE STUDIES

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FS JIL – boring and patient

E133544 – smart and simple

CN – the self employed hedge fund manager

VC – portfolio construction

Ced & 'saig – specialist expertise aimed at FAMILY OFFICE clients

**WHO ARE “THE EXPERTS”, ARE THERE ANY “EXPERTS” ?**

