LEVANTINE & Co
INVESTMENT PARTNERS

INVESTMENT SOLUTIONS
made for you

INVESTMENT MANAGEMENT

YOUR TRUSTED WEALTH MANAGEMENT PARTNER

Finding ways to grow and protect your wealth has become more challenging as regulatory environments shift and tax landscapes evolve. However, a path to realising your most cherished goals while securing your legacy across generations and borders does exist.

At Levantine & Co., we specialise in crafting personalised financial solutions, actively managing your portfolios to ensure you grow and protect your wealth.

WHAT MATTERS MOST

Enjoying financial
security and freedom

Helping your children
become independent

Seamlessly transitioning your
wealth according to your wishes

GROW & PROTECT YOUR WEALTH

NAVIGATING THREATS

Growing your wealth demands constant protection against threats that can reduce its value.

Sustained erosive threats

- Inflation
- Taxes
- Fees
- Bad portfolio performance

These threats can deplete your wealth with severe consequences.

Catastrophic event threats

- Business failure
- Geographic & sovereign risk
- Divorce
- Legal issues
- Unexpected major detrimental events

These threats can arise and derail you.

ISSUES WITH TRADITIONAL PRODUCTS

Preservation

Sustained erosive threats

Protection

Catastrophic event threats

Tend to only focus on potential returns

Don't consider the bigger picture

Come with significant risks

Often lack a proper structure for long-term success

You need to look at it in a different way.
Because you don't fit in a box.
And neither should your
investments.

OUR TAILORED APPROACH

1

LISTEN & ADVISE
We understand your needs, before offering tailored solutions.

2

SOLUTION MATCHING
We align strategies with your unique challenges, always keeping your best interests in mind.

3

BEST ASSET STRUCTURE
Your portfolio is designed for both growth and security.

4

DYNAMIC PORTFOLIOS
We manage client portfolios withdaily insight and responsiveness to the ever-changing investment environment.

5

ACTIVE WEALTH MANAGEMENT
Your portfolio is adjusted as needed, to align with your evolving needs.

WHEN YOU INVEST WITH LEVANTINE

Preservation

Sustained erosive threats

Protection

Catastrophic event threats

Enjoying financial security and freedom

Helping your children become independent

Seamlessly transitioning your wealth according to your wishes

CASE STUDY

Crafting a Tailored Solution for Leyla’s Financial Journey

CHALLENGE

With a storied career in Europe, Leyla, a dedicated executive of a renowned international company, accumulated substantial wealth, particularly in company shares through bonus stock-options. But, with her decision to relocate back to Turkey came pressing financial dilemmas: how to preserve her wealth and ensure a relaxed retirement.

SOLUTION

Leyla’s financial panorama was complex. The primary challenge was the significant concentration of her wealth in a single company’s shares, posing a high risk. Additionally, she sought a sense of security regarding her retirement. We identified these concerns and took immediate action.

Recognising the intricacies of her financial situation, we first directed Leyla to secure specialised tax advice. Based on the insights garnered and her personal preferences, we strategised to transition her assets into an international pension plan. This facilitated tax efficiencies and fortified protection for her assets. Her concentrated stock position was gradually integrated into a customised Levantine & Co-managed portfolio that aligned seamlessly with her financial aspirations and risk appetite.

OUTCOME

The results have been nothing short of transformative for Leyla. She now commands a well-balanced, long-term investment portfolio that resiliently performs despite market upheavals. The diversification strategy has substantially reduced risks and increased potential returns. Additionally, the continuous engagement between Leyla and our investment team at Levantine & Co. ensures that her portfolio evolves with her life’s journey, ensuring she’s always one step ahead. Leyla’s financial future is not just secure, it’s thriving.

CASE STUDY

Securing a Global Future from Local Success

CHALLENGE

From the vibrant heart of Johannesburg, our client, a successful businessman, has made a mark by adding significant value to South Africa's economy. As he approached the horizon of retirement, he sought to navigate the intricacies of global financial planning, looking beyond the borders of South Africa and contemplating a serene retirement in the UK.

SOLUTION

Asset Externalisation and Diversification
Recognising the volatility and uncertainties associated with keeping all assets in one region, the primary goal was to externalise a portion of his funds, diversifying exposure outside South Africa. This secures his wealth and opens avenues for growth beyond SA's economic landscape.

Retirement and Asset Growth
As a prospective retiree, our client had significant domestic and international assets. While he isn't currently dependent on these assets, he envisages relying on them during his golden years. Our recommendation was to establish an international pension. This pension is a bulwark against any adverse financial developments in SA. It sets the foundation for his retirement, especially considering a potential move to the UK.

Succession Planning
Given the substantial size of his portfolio, it became evident that a portion of the wealth would transcend his lifetime. Preparing for this eventuality, we emphasised the importance of ensuring that succeeding generations receive the assets promptly and efficiently. An internationally diversified multi-asset growth portfolio was curated to meet his financial aspirations, ensuring that the portfolio remains dynamic, adapting to changing needs over time.

OUTCOME

With strategic diversification, an international pension plan, and an evolving multi-asset portfolio, our client is well-poised for a comfortable retirement. Beyond his aspirations, he's ensured that his legacy will seamlessly transition to the next generation, reflecting foresight and meticulous planning. Through our partnership, he can confidently step into the next chapter, knowing his aspirations and those of his descendants are well-guarded.

Disclaimer: Be advised that while our case studies draw from genuine incidents, they have been modified for privacy. They combine multiple client experiences and feature fictitious names, places, and professions.

CASE STUDY

Safeguarding a Legacy for Generations

CHALLENGE

Meet Adrian, a second-generation owner of an international manufacturing business. Established by his father, William, this business has been a testament to hard work and perseverance. However, as years went by, William accumulated substantial family wealth overseas without a comprehensive investment strategy. As William approached his later years, ensuring a seamless wealth transition and implementing robust governance became paramount.

SOLUTION

Wealth Transition and Governance

William desired a smooth transition of wealth to Adrian and to ensure sound family wealth decisions. Our initial step was to consult with a renowned tax advisor. This helped devise a tax-efficient solution that met the family's needs and was compliant with their residency status.

Investment Strategy

Recognising the importance of growing and preserving the family's wealth, we designed an internationally diversified portfolio. This portfolio emphasised both equity and fixed income, targeting long-term capital appreciation. Moreover, our strategic collaboration with a prestigious Swiss Bank, where we operate as external asset managers, enables us to deliver a comprehensive suite of services. This synergy allows for the seamless integration of our multi-asset portfolio with a diverse range of alternative asset solutions offered through the bank's platform. As a result, Adrian and William gained exclusive access to our expert advisory services within one of the world's foremost private banking platforms.

OUTCOME

The strategic long-term investment allocations, bolstered by semi-annual reviews, facilitated more transparent communication and understanding among the family members. This strategy minimised key risks, fortified family governance, and streamlined succession planning across generations. By partnering closely with Adrian and William, we ensured that every decision took into account the multifaceted intricacies of the family's wealth, cementing a legacy for future generations.

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EXPERIENCE THE LEVANTINE DIFFERENCE

With unwavering commitment, we place your interests above all else.

TRUSTED PARTNERSHIPS

We provide guidance every step of the way.

PERSONALISED PORTFOLIOS

We tailor your investments to meet your changing needs.

WEALTH PROTECTION

Our structured approach secures your legacy.

EXPERIENCE THE LEVANTINE DIFFERENCE

With unwavering commitment, we place your interests above all else.

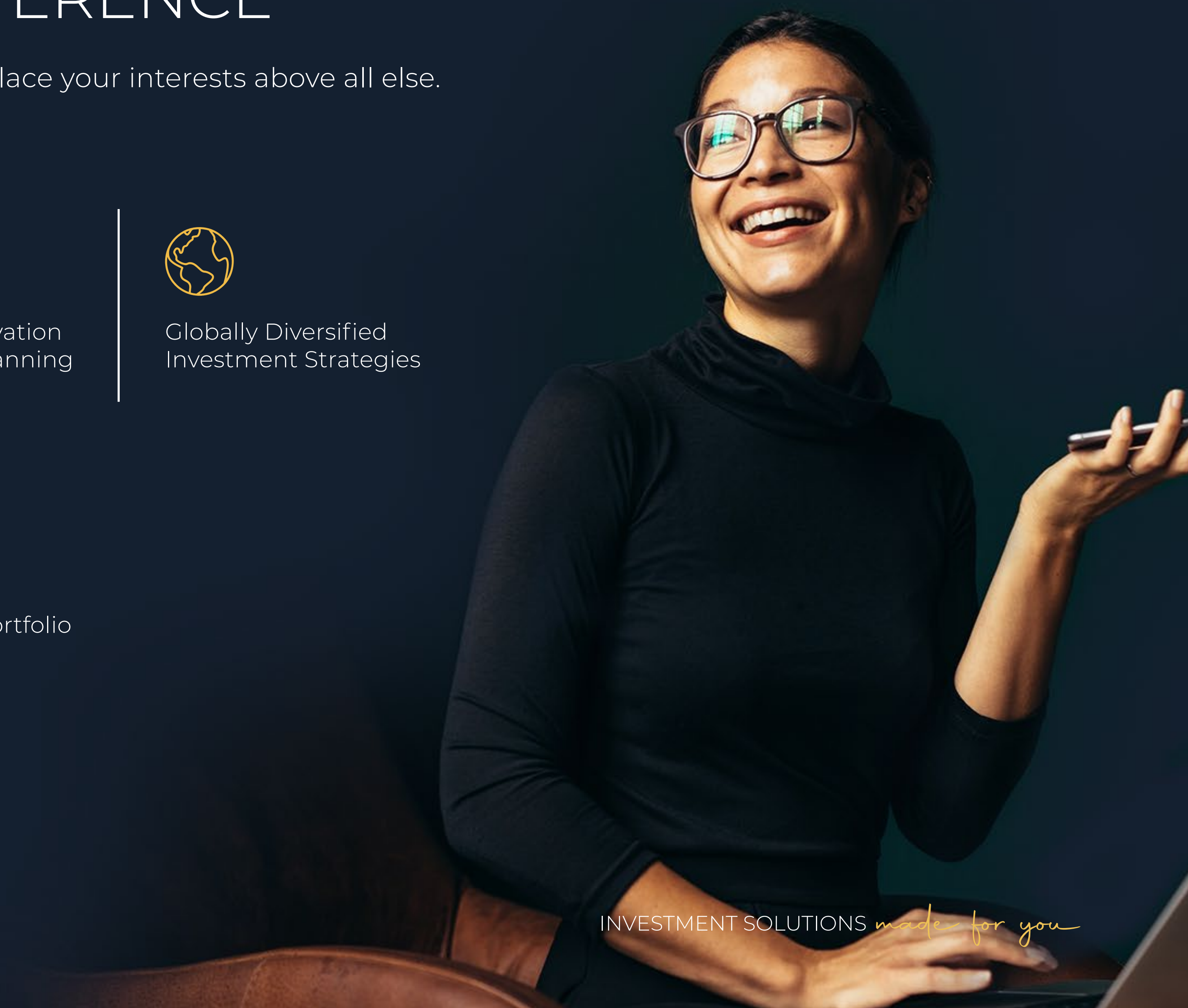
Personalised
Investment Strategies

Wealth Preservation
and Legacy Planning

Globally Diversified
Investment Strategies

Dedicated
Client Service

Customised Portfolio
Management



Levantine & Co. is an authorised Financial Services Provider FSP 44104.

Because you don't fit in a box. And neither should your *investments.*

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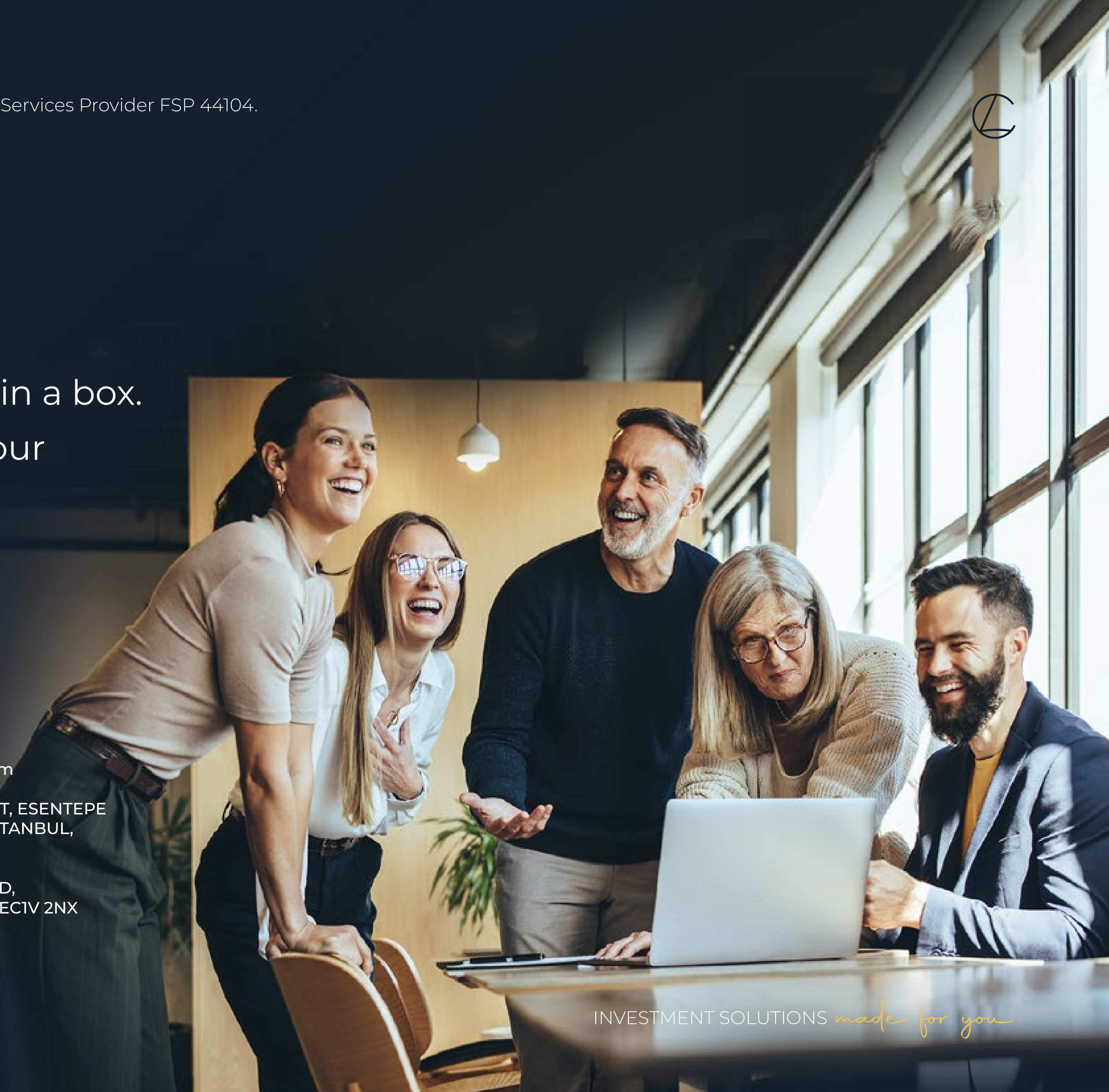

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