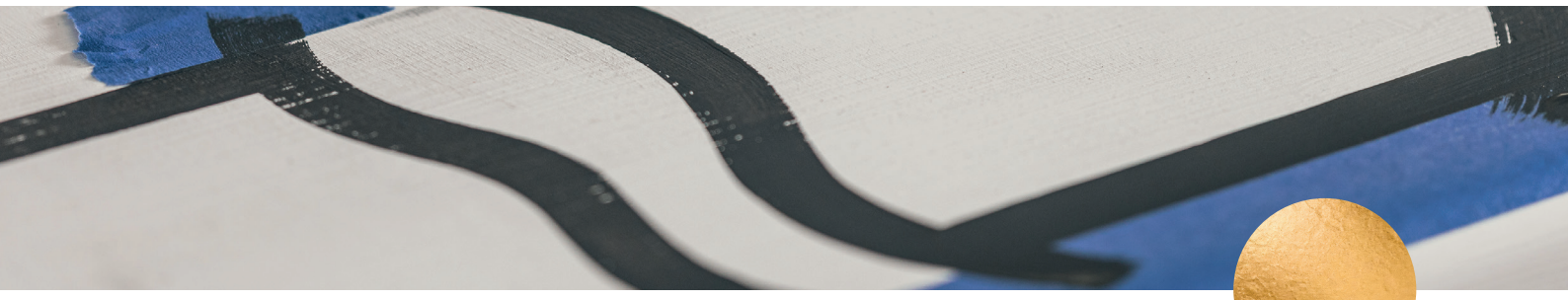
Sanlam PRIVATE Wealth



YOUR WEALTH. OUR CRAFT.

You require customisation in every aspect of your life. Why should your approach to wealth be any different?

Whether you're growing a legacy, preserving wealth across generations or navigating global complexities, you're looking for more than investment returns. You want a partner who understands what matters to you – and why.

At Sanlam Private Wealth, we work closely with clients and advisers to craft customised solutions that reflect your goals, suit your circumstances and evolve with you.

WHY CHOOSE US?

A wealth plan that fits your life

Your personal wealth plan reflects where you are and where you're heading. It's built around you – not bought off a shelf. You'll own the assets in your portfolio, giving you full transparency and flexibility.

More than investments

You may need more than portfolio management. From tax advice and multi-jurisdictional estate planning to bespoke lending and fiduciary services, we offer seamless, end-to-end solutions. Because life doesn't happen in silos – and your strategy shouldn't either.

Access to the people who manage your money

You'll speak directly to the experts managing your portfolio – no call centres. You choose how involved you want to be. We're here to listen, adjust and build trust over time.

Specialists who deliver with consistency and care

Behind every portfolio is a handpicked team of skilled professionals, blending experience with fresh insight. Our focus is simple: understand your goals, cut through the noise and deliver real outcomes.

Performance with purpose

It's not just about beating benchmarks – it's about meeting your objectives. Our global and South African equity and multi-asset portfolios have a strong track record of outperformance over the long term. But more importantly, they're built for real-life outcomes.

A global perspective, tailored to you

Our reach is global, but our advice is personal. With offices in South Africa, Guernsey and Mauritius, we help you unlock global opportunities, diversify risk and structure your wealth across borders with precision and care.

Strength you can depend on

With around R265 billion (US$15.3 billion) in assets under management and administration, and the backing of the Sanlam Group – the largest non-banking financial services group in Africa – you benefit from the agility of a specialist, combined with institutional strength and enduring stability.

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OUR EXPERTISE

Investment management

Whether you're looking for a traditional investment strategy focused on equities, fixed income and cash, or a non-traditional approach incorporating alternative solutions such as hedge funds, private equity and private debt, your global portfolio will be shaped to reflect your risk profile, goals and values.

You may be:

- Growing and preserving multi-generational wealth
- Investing with retirement in mind
- Seeking income after retirement
- Building an offshore strategy
- Looking for Shariah-compliant investments.

Wherever you are in your wealth journey, we'll tailor your portfolio to serve the future you're building.

Fiduciary and tax services

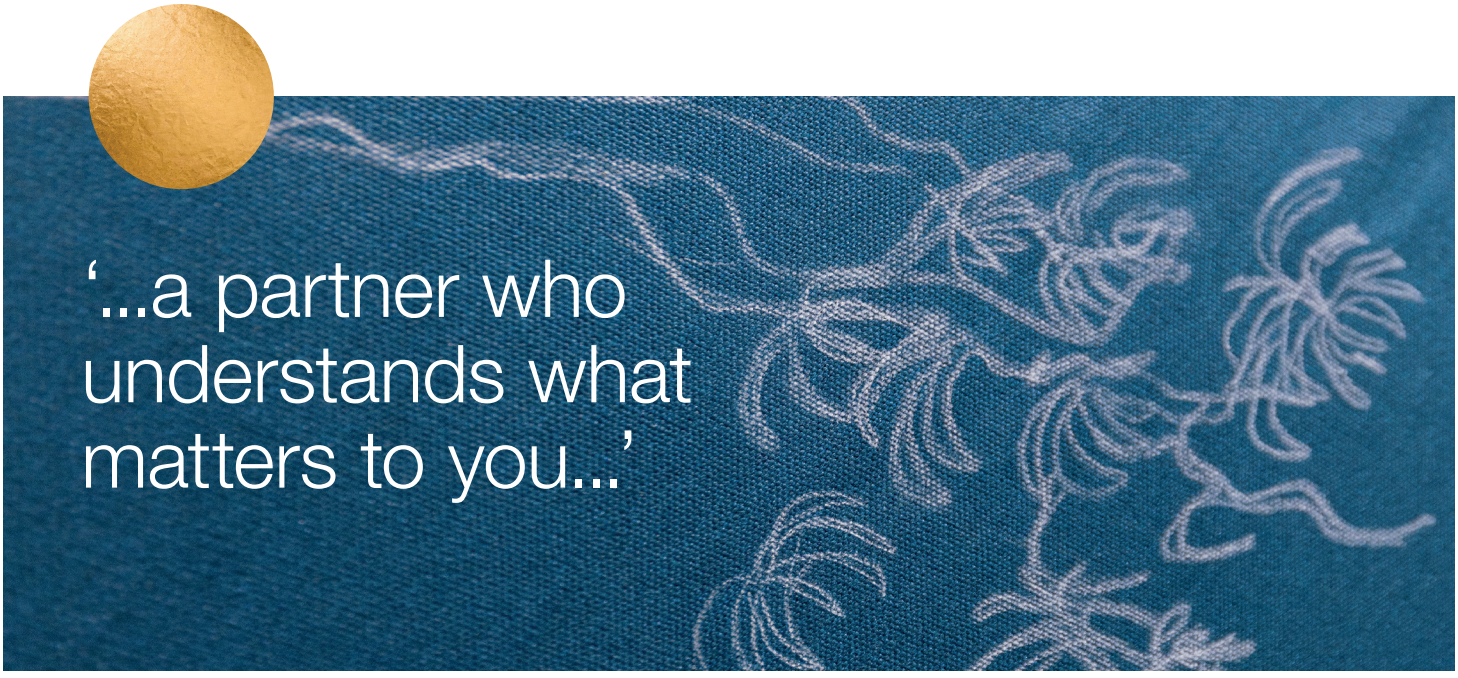
Our fiduciary and tax specialists collaborate with your portfolio manager to provide expert advice, structuring and administrative services that are tailored to your needs and circumstances. This includes the setting up and management of South African and offshore trusts, global tax structuring and estate planning, as well as administrative tax compliance services.

Equity-backed finance

Use your equity portfolio to unlock finance or short-term guarantees at competitive rates – with speed and flexibility that match your pace.

Stockbroking and trading

We offer a range of institutional and retail equity and derivative trading services. Our institutional services include trading, market making for exchange-traded funds (ETFs) and direct market access (DMA) for third-party managers.



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