

## YOUR INVITATION...

**We have the pleasure of inviting you to a breakfast workshop on offshore structures and international investment**

### THE WORKSHOP AGENDA INCLUDES:

- Important Updates on the 2016 Budget and in Particular the DTC Proposals in relation to trusts
- Comparing vehicles to hold offshore wealth, i.e. offshore endowment, offshore trusts and foreign pensions
- Discuss developments in International Markets and points to consider when recommending portfolios for your clients
- Providing investment advice in a post RDR world, and why utilising a Discretionary Fund Manager allows you to focus on your core job – planning and advice

CPD certificates will be issued for attendance.

**Venue:** Kelvin Grove, 144 Campground Road, Newlands, 7700

**Date:** 15th March 2016

**Time:** 8:00am – 9:30am

**Our aim is to host an interactive event with plenty of opportunity to ask questions.**

**Please confirm your attendance with Nicole Dijkstra by email or phone by the 5th of March as seating is limited and we need to cater accordingly.**



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(021) 851 5584



**MiltonOptimal**

**Milton Optimal will present on the investment related aspects.**

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