



AUTUS

PRIVATE CLIENTS

SEASON'S GREETINGS FROM OUR DIRECTORS



May the spirit of love gently fill our hearts and homes this festive season, and may you find many reasons for happiness.
We wish you and your loved one's peace, health, happiness and prosperity in 2021.





20 YEARS SINCE INCEPTION

Christo Malan - Chairman



*"Life can only be understood backwards, but it must be lived forwards."
-Søren Kierkegaard*

*"The future belongs to those who believe in the beauty of their dreams."
-Eleanor Roosevelt*

In January 2000, we established Autus with:

- three clients, many dreams and no idea of what the future held;
- a passion for people and investments and an oath not to be ruled by corporate jargon again.

Never could I imagine how the **Autus story would unfold looking back after 20 years**. Without the support of clients, excellent staff, implementing and revising processes, adapting to changes, still learning new lessons every day and continuing to preserve our company's values, this would not be possible.

In December 2020, at Autus we;

- continue the spirit of touching people's lives;
- advise more than 800 clients on creating and preserving wealth;
- have a great team of qualified and experienced staff living the Autus values;
- operate from offices in the Vineyards (Welgemoed), Val de Vie (Paarl) and the Garden Route (Great Brakriver);
- was awarded the International Advisor SA Best Advisory Practice 2019 (plus two additional awards); awarded for 2020: Excellence in Client Service and Excellence in Marketing;
- celebrate the SA Financial Planner of the Year 2019, received by Hardi Swart;
- are excited and have many dreams for the future.

On behalf of our clients, we salute Autus Fund Managers for significant returns over the long term and especially during a challenging 2020. To all clients who joined during 2020, welcome to the Autus Family, and may you and all our existing clients experience the appreciation for your support and the excellent service we strive to offer.



PLANNING FOR THE NEXT 20 YEARS

Dominic Ilett - CEO



Bill Gates, former Microsoft CEO, recently **made predictions of how the world is likely to change:**

- he predicted that remote meetings would become the norm;
- offices will be shared on rotation;
- people will choose to live in different places;
- we will socialise more with our communities than with our companies;
- the eradication of Covid-19 may take longer than we think. Even the best vaccines take time to roll out, so while infection rates will come down, there are likely to be outbreaks from time to time;
- many people – especially those who feel vulnerable – may err on the side of caution when it comes to going out to crowded venues for a while. This could limit the extent of the economic recovery.

At Autus, some of the above is already taking place. We routinely conduct remote meetings amongst staff and with clients. Our team are enabled to work from home and already function on a rotation basis. Consequently, we have noticed an improvement in efficiency and productivity will maintaining and enhancing client service. The Autus Team's planning for the next 20 years incorporates the flexibility to meet future changes. We will adapt our processes and services to continue to remain at the forefront of the financial planning industry.



FINANCIAL PLANNER OF THE YEAR

Hardi Swart, CFP® - Director



When I was chosen as the Financial Planner of the Year by the Financial Planning Institute of South Africa at the end of 2019, little did we know what 2020 had in store.

This award was the result of hard work and a commitment to client-focused service as well as the support of an exceptional team.

At Autus Private Clients, we subscribe to the following values:

- Our clients and staff are the heartbeats of our organisation, and we care for the things that make a meaningful difference in their lives.
- We cherish and respect the diversity of our team. Through teamwork, we emphasise our strengths to deliver above-average results.
- In our attempts to make the world a better place, we accept the responsibility of good stewardship of our future and take pride in being able to help others.
- Autus is built on the trust placed in it by its clients, and we continue to put honesty and integrity first.

To market our services in 2020 was a challenge. We adapted to virtual Zoom meetings when personal contact was impossible. Potential clients were unable to visit our offices to appreciate the Autus experience altogether. Yet, despite this, we were successful in growing our client base and increasing the assets under management. My sincere thanks to all our clients and staff for adapting to the unforeseen challenges of 2020, and we look forward to a better 2021.



FINANCIAL FREEDOM STARTS WITH A PLAN

Allan Geldenhuys, CFP® - Director Vineyards office



The popular adage *"Failing to plan, is planning to fail"* may sound like music to your ears. Maybe it was uttered to you as you prepared for an important future life event. Or perhaps you shared this message with someone else in your life. Maybe you've read the statement and thought: "yes, that is obvious, it makes sense", and left it at that.

Financial freedom is nearly impossible without having a clear goal-orientated financial plan.

When it comes to wealth creation and financial planning, success is 20% drafting a plan, and 80% having the discipline to implement and review it.

It needs to be adopted as the blueprint to revert to when making financial decisions. It should not be seen as a document that is rented for the short term, but it should be a plan of action that is owned for the long term.

With a challenging 2020, we again saw the value of having an independent financial plan. By focusing on the future goal, Autus helped many get through the uncertain times by merely sticking to their plan, therefore ignoring short term noise and uncertainty. Something that we will continue to implement during 2021.



CHANGE IS INEVITABLE

Marilize Opperman, CFP® - Director Val de Vie office



Twenty years ago, you probably didn't have an email address, and now it's hard to imagine life (or your business) without email or using Microsoft. Most information is saved in the "cloud", and twenty years ago, Facebook didn't exist, and now more than 1,25 billion people and millions of companies use it to communicate.

Jessica Booth (Insider article Jan 3, 2019) mentioned **a few ways the world changed since the inception of Autus 20 years ago:**

- everyone has a smartphone, and most people don't even know what a Nokia is;
- you no longer have to memorise anyone's phone numbers;
- you now take photos on your cell phone instead of a film camera;
- you make playlists instead of burning CDs;
- you now get updates from the president of the United States on Twitter;
- you can no longer go on vacation and truly take a break from everything.

This year personally brought many changes for me: having to take up the responsibility to manage the administration and servicing advisors teams, head of financial planning and newly appointed director of Autus Private Clients. I am very proud of my team and how they adjusted to the change of working environment; having to work remotely and working optimally electronically. The shift in client portfolio reviews from physical meetings to video calls, emails and phone calls happened without any restrictions, and this sustainable method will still be considered in the future when physical arrangements are not practically possible. I thank my team for their hard work, Autus for the opportunities and growth it grants their employees and our Autus clients for their support en client referrals. The change will continue, and we at Autus are ready to face the challenges. Winning the award from International Advisor: Excellence in client service, for the second consecutive year, is proof of our dedication to adapt to change and be dedicated to our mission at Autus.



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