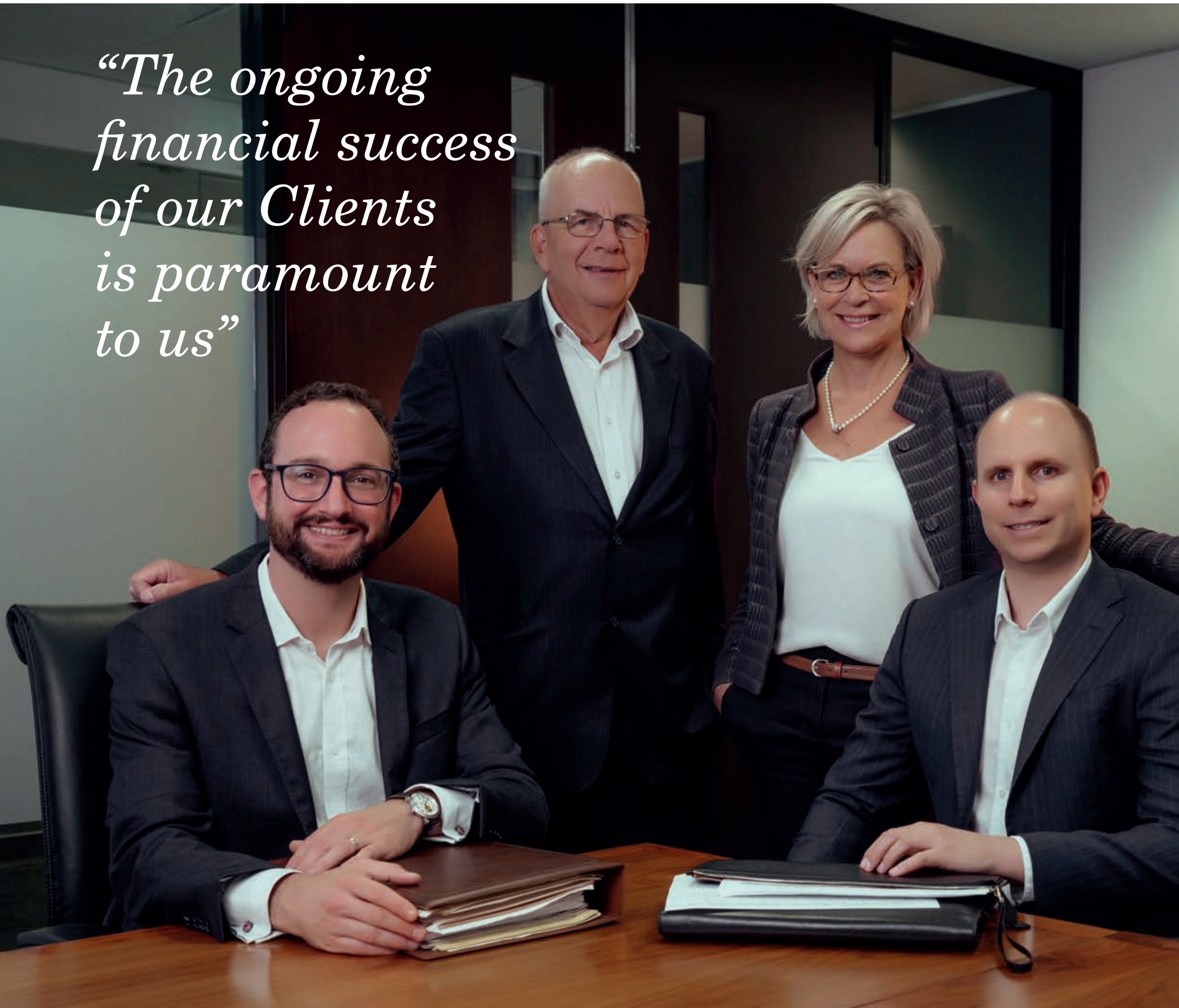
Personal Excellence in Wealth & Family Office

Welcome to BMF Wealth

Creating, growing and protecting Client Wealth



Personal, Caring Hands-on Approach

For over 40 years, BMF Wealth Clients have relied on the personal attention of a Director as a trusted and valued advisor. A second Director also becomes familiar with your important issues to always ensure continuity of service and a high standard of experience and expertise.

Some of our Directors sit on numerous external boards, sometimes as formal board representatives and other times as members of the Advisory Council. Our Directors may also serve as representatives for non-resident Clients assisting them with their Australian matters.

Solutions Driven Expertise

BMF Wealth provides the expertise and commitment Clients seek for their wealth creation, protection and preservation. Always exploring opportunities, we leave no stone unturned and conduct a thorough 'deep-dive' analysis before we make our final recommendations.

When providing investment proposals, our recommendations are ones that we are invested in ourselves and have committed to. Our history of Client success and continuity proves our intensive and committed approach works.

Integrated Private Client and Family Office Service

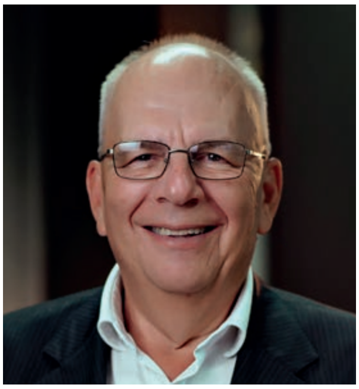
BMF Wealth provides the specialist multi-faceted expertise and services you require all under one roof. Whether your needs are Family Office, Wealth Management or succession and intergenerational planning, our experience and depth of knowledge is vast and proven.

While privately owned, we have a strong network of alliances and global relationships to broaden our reach and capabilities.

Our Mission

Personal Excellence in
Wealth & Family Office

"To provide global expertise in Wealth Management, Family Office and Estate Planning combined with outstanding client service, delivering results beyond expectations"



Barry Mendel
Founder & Executive Chairman
CA, CPA

Barry Mendel is the Founder and Executive Chairman of BMF Wealth and associated companies. He is highly respected as a business, taxation and strategic advisor and has acted on behalf of prominent individuals and companies, both locally and internationally. He is a Member of the Institute of Chartered Accountants in Australia and is also a registered CPA.

Barry has considerable expertise and experience in Corporate Structuring, Taxation and Valuation Methodologies, as well as Litigation Support. He specialises in Asset Management and Wealth Creation Strategies and is qualified in ASIC's prescribed training for Financial Planning Professionals to Wholesale Clients only.

Jill Nes
CEO & Managing Director
CA, JP

Jill is the CEO of BMF Asset Management and BMF International Asset Management. She brings over 40 years' experience in running Family Offices including global wealth management, financial structuring, portfolio administration and reporting, succession and estate planning.

Jill heads up Wealth Management, Family Office and Succession Planning and brings an in-depth knowledge of Local and International investments to our Clients' portfolios. Jill is a member of the Institute of Chartered Accountants in Australia, a Member of the Australian Institute of Company Directors and a Justice of the Peace.

Jill is qualified with ASIC's prescribed training for Financial Planning Professionals in Australia to Wholesale Clients only.

Over the past 40 years, BMF Wealth has managed the needs of High Net Wealth individuals, from CEO's and Directors to Entrepreneurs, Professionals, their Families and their Corporate Entities and Trusts.

Today, recognised as one of Australia's most prestigious financial services providers, BMF Wealth takes pride in offering Clients uncompromising levels of excellence in the creation, protection and preservation of their assets and wealth.

Brad Mendel
Director,
BCOM, CA

Brad specialises in global portfolio management, investment analysis and family office services. He joined the BMF Wealth team in 2011 for two years before embarking to New York.

Brad spent 3 years in New York where he worked as a Private Wealth Advisor with Morgan Stanley Private Wealth Management's 'Team Global'. Prior to his start at BMF, he was at PwC in their Private Clients Tax team serving High Net Worth families. Brad has a Bachelor of Commerce from UNSW and is a member of the Institute of Chartered Accountants Australia. He is qualified with ASIC's prescribed training for Financial Planning Professionals in Australia to Wholesale Clients only.

Justin Gaywood
Director
MSCI, CFA

Justin specialises in providing in-depth financial analysis and research across all asset classes and global markets.

He has 20 years of experience advising institutional, ultra-high and high net worth clients in Geneva, London, Los Angeles, Singapore and Sydney.

Justin assists with managing our ultra high net worth client portfolios from a global perspective. Justin is fluent in French.

Justin is a CFA® charterholder and is qualified in financial planning training as prescribed by ASIC to Wholesale Clients only.

“Local access to Global Wealth Creation, Preservation and Protection”

In-depth global research with the capability to continually discover great opportunities is what differentiates BMF Wealth as well as the fact that they invest in every investment that is recommended to their Clients.

BMF Wealth manages and administers substantial global Funds Under Management.

Wealth Creation, Preservation and Protection

Our strategies vary depending on the Client Risk Profile as well as whether the client is in Wealth Creation or Preservation stage. The most important strategy is to decide on an Asset Allocation Mandate. Once the strategy direction is agreed, we execute and implement our advice which entails the following:

- Advising on the necessary structures to hold investments.
- Purchasing and/or selling Australian and International Direct Shares, Listed and Unlisted Managed Funds, Direct and Listed properties, Alternate Investments, Fixed Interest and Cash, Secured Debt Investments, Gold and Precious Metals.
- Ongoing reviews (at least quarterly, usually more often) which is the most crucial process to ensure that the strategy remains current with your situation, goals and needs. The portfolio is rebalanced to realign with the asset allocation parameters and changing market conditions and to take profits from time to time.
- Client portfolios are always in the Client's entity name and under the control of the Client.

Private Banking and Treasury

As your Advisor we are able to facilitate accounts for you with Australian major banks as well as with Global Private Banks.

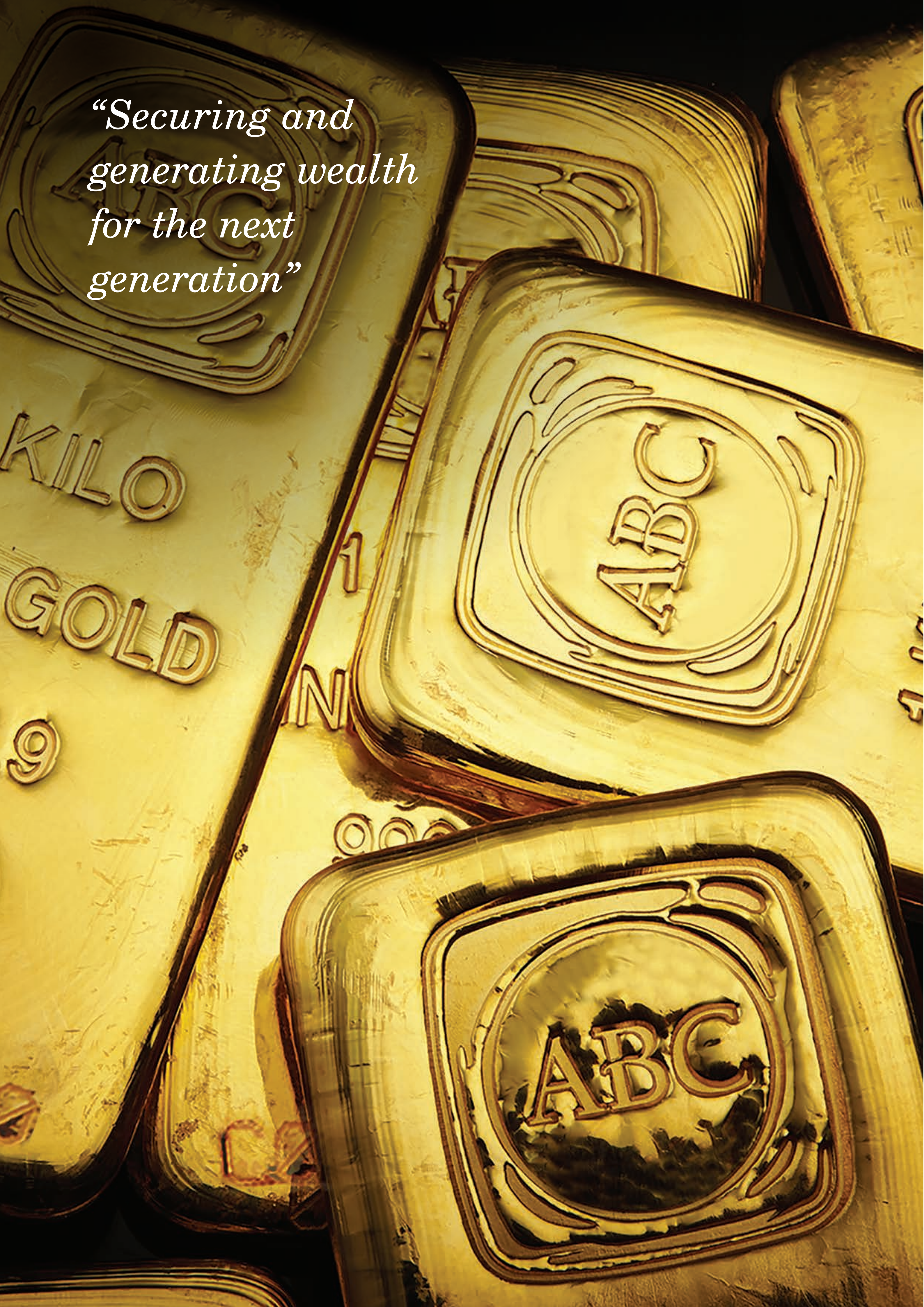
We assess which Bank is the most suitable for you in terms of service levels, product offerings and diversification.

Our relationship also enables our clients to participate in new Securities Issue or Listings that are mainly open to Private Banking Clients only.

Our Advice entails investing for optimal terms which are determined by the Clients' need for Liquidity, Investment Opportunities and Macro and Micro Economic trends.

All accounts and deposits are directly held in our Clients' entities and are controlled by the Client.

“Securing and generating wealth for the next generation”



Estate Planning

To us, the most important part of a Will is a Roadmap we create for a Client enabling that Client's Estate Planning and Wishes to be incorporated into the Will.

Our expertise and understanding of the Client's family, corporate structure and investments owned is critical in briefing the best lawyers who are accredited in Wills and Estate Planning.

We are able to act as Executors, Trustees of Testamentary Trusts and Appointors bringing our professional expertise to the beneficiaries in accordance with the wishes of the Testator.

Family Office & Consulting

Our Family Office provides a complete, seamless and integrated financial service for High Net Wealth Clients who ask the question: *"Who is going to manage my family's financial affairs when I am no longer involved?"*

The successful transfer of wealth across generations is a major issue facing many families in Australia and around the Globe.

To ensure that the interests of the Family on an inter-generational basis are taken care of, we obtain a thorough understanding of the Family as a whole and its family members. This would also involve overseeing the Client's family trust and corporate entities.

We focus on family involvement, education and guidance by assisting with the decision making of the next generation who will inherit by sharing our specialised wealth knowledge. The BMF Family Office becomes the Client's financial centre of excellence providing the management, administration, reporting, advice, education and compliance for their wealth – completely and seamlessly.

The BMF Wealth Story

"Can Do
Will Do"

On the 1st of March 1981, Barry Mendel founded a Financial Services business starting in a small, windowless office in Sydney's MLC Centre, a location widely recognised as being at the epicentre of Sydney's financial district.

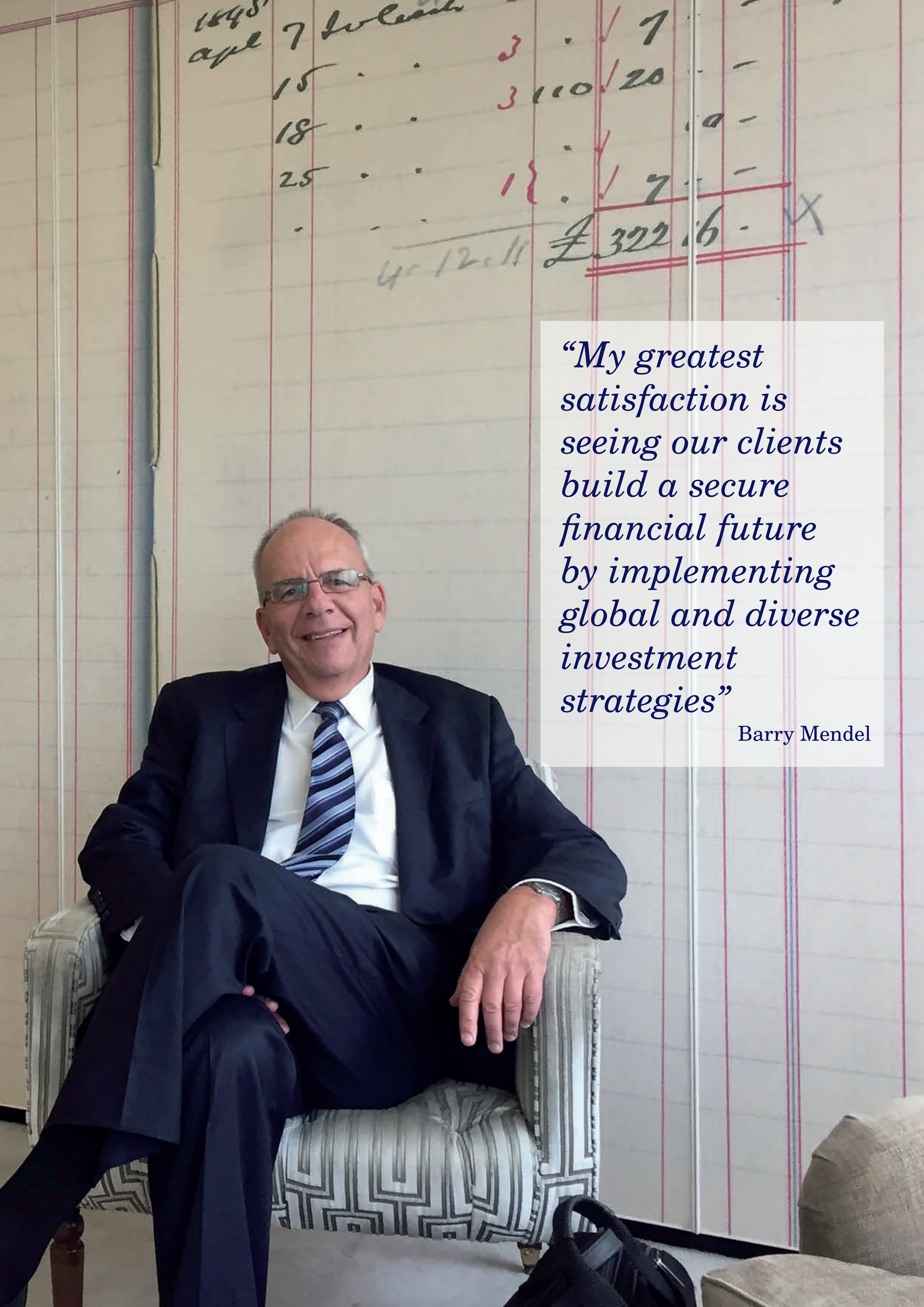
His choice of location was certainly ambitious and has proven prescient, as now 40 years later from this same iconic building, the BMF business, like his office, has grown exponentially to become one of Sydney and Australia's most respected and successful Financial Services firms with International recognition and accreditation.

Over the four decades, Barry and the BMF Wealth team have achieved their success through a unique mix of financial acumen, sheer hard work, grit, determination and the ability to think outside the box with a true belief and confidence in their advice and aligned recommendations.

Today, as one of Australia's premier Global Wealth Management firms, Barry is still hands-on as Executive Chairman, with Jill Nes as CEO.

Supported by Directors Justin Gaywood and Brad Mendel, they form an exceptional team with their global wealth management experience and expertise.

Integrity, professionalism and the highest levels of service are the foundations on which BMF Wealth is built, covering not only Investment advice but Family Office and Estate Planning services to High Net Wealth Families, the next Generations, Executives and Entrepreneurs.



"My greatest satisfaction is seeing our clients build a secure financial future by implementing global and diverse investment strategies"

Barry Mendel

Personal Excellence in
Wealth & Family Office

Business and Postal address:

BMF Wealth, Level 53, 25 Martin Place, Sydney NSW 2000 Australia
T: +61 2 9221 5111 E: bmf@bmfwealth.com W: www.bmfwealth.com

Global relationships in London, New York, Singapore, Zurich and Geneva

Global Wealth Management, Family Office & Succession Planning

BMF Asset Management Pty Ltd (AFSL 224035)
BMF International Asset Management Pty Ltd (AFSL 320237)
Australian Business Nominees Pty Ltd
25 Martin Place Pty Ltd

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