

CREATING A
SECURE FUTURE
STARTS NOW

WELCOME TO THE AMA GROUP OF COMPANIES

“We are
committed
to long-term
partnerships.”

Austen Morris Associates is a trusted global financial services consultancy committed to long-term partnerships. We have over 7,500 clients across more than 90 countries globally.

Founded in 1994, we strive to reward the trust our clients have placed in us, by sourcing leading and competitive investment products and solutions that best suit our client's individual needs. We have always sought industry presence and success on a global scale, with offices in China, South Africa, North America, Europe, Philippines, and Mauritius. Our ability to seek out innovations and opportunities globally and quickly implement them has made Austen Morris Associates a global leader in the financial services industry.

As Independent Financial Consultants, we provide unbiased advice and give you access to the world's top investment management groups.

Our Consultants offer a wealth of experience in providing the full spectrum of financial advice. Our commitment to ensuring your peace of mind reinforces our focus on trust and partnership.

By focusing on your specific needs and situation, we tailor plans to reach your financial goals while maximizing the benefits of international investing.

To begin your journey towards total financial security, you are invited to meet with one of our Consultants to understand our

financial planning approach and why our clients become loyal and long-term partners. We are committed to long-term partnerships and understand we would be as invested in your future, as you would be in ours.



Greg Morris | Founding Senior Partner
Austen Morris Associates

+7500
CLIENTS



GLOBAL CLIENTS IN
+90
COUNTRIES



+9000
INVESTMENTS



+\$1.2 billion
IN ASSETS UNDER MANAGEMENT
AND CONTRACTUAL OBLIGATIONS

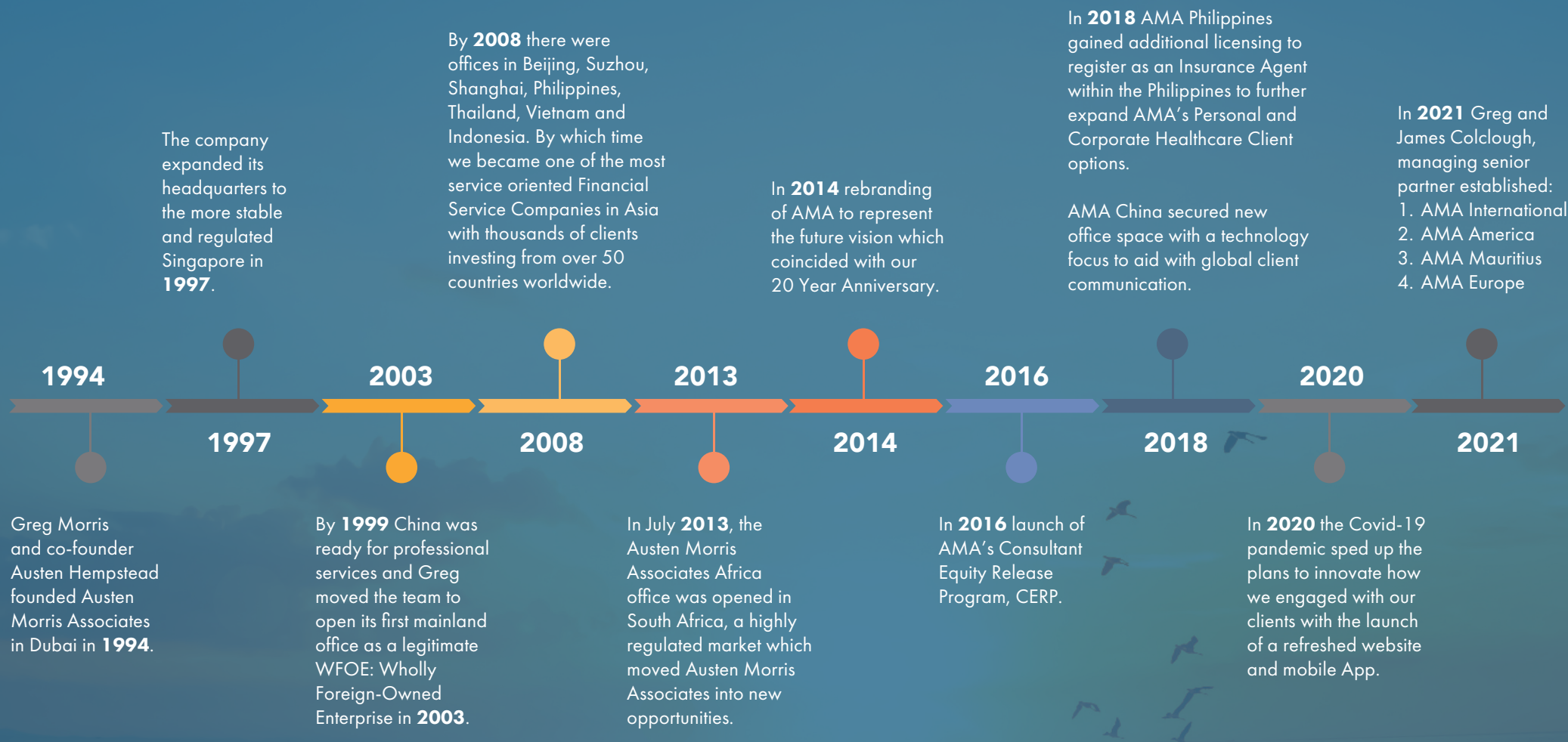


ESTABLISHED IN
1994
HERITAGE OF > 2 DECADES



INTRODUCTION TO THE BRAND

Trust was a core value from the early days of our business, resulting in the long-term relationships that have become the foundation of The **Austen Morris Associates Group of Companies** today.



THE AUSTEN MORRIS ASSOCIATES GROUP OF COMPANIES MANIFESTO

Austen Morris Associates is committed to **long-term partnerships**.

We will always continue to build upon our history of market leadership with **integrity** and **innovation**.

We will always strive to reward our clients' trust placed in us by returning the **best results for our clients**.

We will **grow with our clients together, always** protecting and developing their portfolios.

We will always contribute to the **well being of the larger community**.

We will always keep our commitment to being **agents of positive change**.

We will always **value the opportunities** we are given.



Invested Together, Always



WE PROVIDE FINANCIAL SOLUTIONS

Visit one of our licensed city center offices and you will be warmly welcomed and introduced to your dedicated Consultant. During this first meeting your Consultant will help identify where you are today and where you want to be over the months and years ahead. Once your objectives are clear, planning for financial security and success begins.

After the first consultation, your Consultant will provide sound advice, utilising the entire resources of Austen Morris Associates and our team of dedicated researchers. Once completed, the report will be delivered to you in preparation for your second consultation.

The main objective for the second consultation, is to answer any questions you or your partner may have regarding the recommended plan, we will then begin the journey to your financial security together.

You will now have taken the most important step towards achieving financial security and independence. If for any reason additional information is required or your circumstances change, we will arrange to meet again until your new needs are satisfied.

With your personal Consultant, we will constantly monitor the progress towards the achievement of your goals and inform you of any new financial opportunities. You will have access to the details of your investment and a quarterly review through our Wealth Management Service.

Unlike many other institutions, our Wealth Management Service provides a unique ongoing service provided to all our clients, large or small, with additional options available for the more active investor.

Whatever your hopes are for the future, fulfilling them will require solid financial planning and the products and investments to turn your financial planning goals into reality. When implementing your financial planning strategies you may want to take full advantage of the benefits of International Investments, including tax-deferred investments that can help you take advantage of the asset building potential of the financial markets.

“We will always strive to reward the trust you have placed in us by returning the best results to you.”

OUR COMPLETE SERVICE OFFERING:

“We will grow together
by always protecting and
developing your portfolio.”

PRIVATE WEALTH MANAGEMENT



Retirement Modelling &
Planning (UK and US)



Estate Planning &
Trust Structuring



Discretionary Lump
Sum Investments



Quantitative Portfolio
& Fund Analytics



Mutual Funds & Exchange
Traded Funds



International Tertiary
Education Planning



Direct International
Property Investments



Portfolio Gearing &
Sophisticated Investments



Direct Share/Stock
Investments



Investment Bank
Products



Asset Rescue Transfer



Individual Insurance



Health Care



Business Assurance



Employee Benefit Schemes

AMA INNOVATION & TECH – APP AND INVESTOR PORTAL

Austen Morris Associates' philosophy for client servicing is simple: to provide a tailored, easy-to-understand service to match your exact needs.

“Service is at the heart of everything we do.”

We strive to innovate through embracing new technologies to constantly improve our service standards.

We use the latest technology to deliver the best solutions in the most effective way possible while never losing sight of the human side of client servicing.

THE AUSTEN MORRIS ASSOCIATES CLIENT INVESTOR PORTAL

Austen Morris Associates has developed a client servicing system, which is effortless and straightforward to use. Quite simply, this system allows you to receive better information, save time and achieve higher growth.

AMA clients have their own unique access to the AMA Interactive Client Engagement System and a Personalised Investor Portal. This fully-integrated account management platform, powered by Morningstar*, provides our individual clients with a secure, safe and confidential way to view and keep track of all of their investment information.

THIS INCLUDES:



Up-to-date investment valuations



Fund information



Performance information



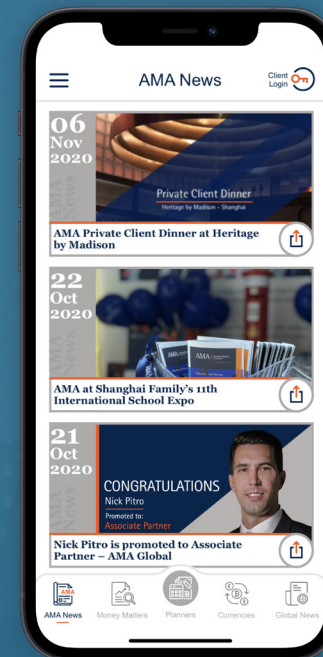
Access to view your individual financial fact and risk information

THE AUSTEN MORRIS ASSOCIATES MOBILE APP

AMA has its own AMA App offering helpful currency converters, investment planners and global finance news.

AMA clients are able to securely monitor their investments on the App, literally at their fingertips.

Download our **AMA App** [here](#).



*Austen Morris Associates entrusts Morningstar with our client data to provide you with an unrivalled account management experience. The world's leading financial advisers, investment managers, institutions, accountants and product providers use Morningstar to manage or administer their client's investments globally, of which Morningstar provide this service to more than 500,000 account holders.

CONTACT US

AMA | Austen Morris
Associates

Invested Together, Always



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FOLLOW US



THE AUSTEN MORRIS
ASSOCIATES GROUP
OF COMPANIES:



AMA
AFRICA



AMA
CHINA



AMA
EUROPE



AMA
INTERNATIONAL



AMA
NORTH
AMERICA



AMA
PHILIPPINES