

ZURK BOTHA ASSOCIATES (Pty) Ltd

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Discretionary portfolio managers: FSP license no: 17350
Co reg nr: 90/02878/07
Directors/Direkteure: Z. Botha CFP, T. Botha

16 September 2022

ZURK BOTHA ASSOCIATES (PTY) LTD: FSP 17350 AMALGAMATION WITH EQUITY TRUST: FSP 368

On 1 May 1989 we took over the practice which was known as Oosthuizen and Labuschagne. The name change was made a year or two after that. Over time the practice's focus expanded from employee benefits to wealth management.

The directors of ZBA decided to merge individual wealth management services with Equity Trust (Pty) Ltd, with whom we have been in association with since the early 2000's.

Who is Equity Trust?

Equity Trust, established in 1998, is an independent financial advisory firm that focuses on delivering professional and bespoke financial solutions to individual and corporate clients. These ethical standards, philosophies together with their financial advisor's knowledge and experience are the conforming drivers towards meeting our client's goals and objectives. Please visit the website at www.equitytrust.co.za for more information on current directors etc.

How does the changes affect you as our client?

There will be no changes in products, companies, fund management methods and client portfolios because of the merger. We have a mandate with you which is still valid and we will continue services accordingly. The larger group however brings better negotiation capabilities and we will share compliance and support services providing more client time.

Changes in administration team?

No changes are made at amalgamation date. If any changes occur, it will be additions to the team as the current staff is retained.

Offices

Zurk would operate out of the Faerie Glen offices as base, whilst Alex would serve from both Brooklyn and Faerie Glen offices. Ground-floor level Boardrooms are now available for more comfortable feedback sessions if convenient.

Contact details

Telephone numbers and other contact details remain the same. You may expect additional landline and Equity Trust email addresses.

Is there something you should do?

At this stage nothing is required. We will be in contact with you should there be additional administrative requirements. The process will be implemented by means of a book transfer between FSP codes on all the relevant service providers. We shall ensure that we do everything in our power to facilitate a smooth process with minimum inconvenience.

We are looking forward to new opportunities and advantages brought to you by a combined effort and thank you for your continuous support.

Kind regards

Zurk Botha CFP®