

## Contact Us

### Johannesburg

17 Melrose Boulevard

Melrose Arch

Tel: 011 448 5041

### Cape Town

4th Floor, Sunclare Building

21 Dreyer Street

Claremont

Tel: 021 003 9222

### Durban

Unit 201, 25 Richefond Circle

Ridgeside Office Estate

Umhlanga

Tel: 031 536 8845



GRADIDGE  MAHURA  
INVESTMENTS

Independent. Professional. Confidential.



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PO Box 78219, Sandton 2146  
Gradidge-Mahura Investments (Pty) Ltd Reg. No.  
(2008/015332/07) / FSP No. 36327  
Gradidge-Mahura Asset Protection (Pty) Ltd Reg.  
No. (2016/399951/07) / FSP No. 48616  
Affiliations: Masthead Distribution Services,  
Financial Planning Institute of Southern Africa.

### Top Private Banks & Wealth Managers Survey:

- Top Wealth Manager: 2018
- People's Choice as Top Wealth Manager: 2017 & 2018
- Top Wealth Manager for Lump-sum Investors: 2018
- Top Wealth Manager for Young Professionals: 2018

**intellidex<sup>®</sup>**  
Researching Capital Markets & Financial Services

## About Us

Gradidge-Mahura Investments (GMI) was founded in 2008 by Craig Gradidge and Kagisho Mahura. Despite starting operations in the middle of a profound global financial and economic crisis, the company has continued to grow and attract a high quality client base from around the country.

GMI won four major awards at the Top Private Banks & Wealth Managers Survey in 2018 including the coveted overall Top Wealth Manager, the People's Choice award, Passive Lump Sum Investor and the Young Professional categories. In 2017, the business won the People's Choice award.

GMI is South Africa's only black owned FPI Approved Professional Practice™. This accreditation is awarded to Financial Planning Practices that meet the requirements set by the Financial Planning Institute of Southern Africa and gives clients peace of mind that they are dealing with a professional practice that is adhering to the highest financial planning standards.

GMI earned the Masthead FAIS compliant seal every year since it was introduced in 2015. This is an indication that the practice is run within the requirements of the relevant laws. A practice needs a minimum of 85% for every audit in the year to earn the seal.

## Our Service Offering

### For Individuals

#### Wealth Creation

##### Investment Management

Unit Trusts,

\*Share Portfolios

BBBEE Public Share Offers education

Offshore Investments

Tax-free Savings Investments

**Alternatives:** Private Equity, Hedge Funds,

\*Section 12J Investments

Long-term and Short-term Deposits

Guaranteed Equity Notes

Exchange Traded Funds

Cash Management

##### Retirement Planning

Preservation Fund

Preservation Fund

Post-Retirement Income

#### Wealth Protection

##### Risk Management

Life Insurance

Disability Cover

Severe Illness Cover

Income Protection

\*\*Short-term Insurance

Medical Aid

##### Fiduciary and Tax Services

Trusts - \*via associates

Estate Planning

Wills - \*via associates

Tax Planning - \*via associates

## For Corporates

#### Group Risk Benefits

Life

Income Protection/Disability

Severe Illness

Funeral

#### Umbrella Pension/Provident Funds

#### Group Retirement Annuities

#### Business Assurance

#### Medical Aid

#### Investment Management

#### Corporate Finance

#### \*\*Short-term Insurance

#### Pension Fund

#### Member Engagement

#### Financial Education

\*Associates mean independent non-competing businesses with whom we have formal advice, service and fee-sharing agreements.

\*\*Gradidge-Mahura Asset Protection (Pty) Ltd – FSP No. 48616 is a subsidiary of Gradidge-Mahura Investments.

Our highly qualified and experienced advisors are readily available to secure the financial future of our clients and their families. Through our comprehensive risk analysis process we protect our clients from unforeseen events that can ruin their financial security.

We have a track record of achieving excellent investment returns which ensures our clients can achieve their dreams e.g. retiring comfortably and maximising an investment portfolio.

## Why Choose Us?

### 1. Independent

GMI is totally independent and is not limited to work with any specific product provider. GMI has contracts with Allan Gary, Cadiz, Discovery Life, Investec, Liberty Life, Momentum, Old Mutual, PPS, Sanlam and STANLIB thereby offering tailor made solutions to clients.

### 2. Professional

GMI comprises three distinct highly qualified teams; Advisory, Technical Support and Service. These teams are all supported by Corporate Services. Our expertise, experience, philosophy and process are the cornerstone that imbues professionalism in delivering a quality wealth management service.

### 3. Confidential

At GMI, we believe that confidentiality is an important aspect in building trust and creating open, honest, sustainable and working relationships. Our philosophy is on building long term relationships, which attributes to our high client retention rate.