K2 CAPITAL

KNOWLEDGE · SERVICE · INTEGRITY

KNOWLEDGE

SERVICE

INTEGRITY

OUR OFFERING

K2 Capital is an independent financial services boutique, offering a unique value oriented approach to our clients' wealth management requirements.

We work on the foundation of

KNOWLEDGE

SERVICE

INTEGRITY

K2 Capital provides highly bespoke investment counselling and reporting on all aspects of your wealth.

We offer the following services:

- A full Investment Advisory and Asset Management offering
- Cash Management solutions
- Retirement Planning strategy formulation
- Estate Planning and Fiduciary Management
- Bespoke Structured Solutions
- Private Equity opportunities

The company began life as a pure multi-family office, providing holistic balance sheet management for affluent families. It continues to successfully serve this highly specialised market segment but has reacted to client demand and introduced an expanded service offering to assist other potential clients with their broader wealth management requirements.

K2 Capital leads the industry with our extremely valuable blend of wealth management and asset management experience underpinned by the highest standards in academic and ethical excellence. We continually invest in our ability to remain globally competitive and up to date by accessing leading research and academic work.

Our **value proposition** focuses on the generation of real returns for our clients and we manage portfolio risk with their individual objectives in mind.

Our **core philosophy** sees us designing and implementing a value based active asset allocation strategy in support of our value proposition. We recognise that growing one's wealth often requires patience and a willingness to be contrarian.

Our **key differentiators** arise from the quality of the skills embedded in the people in the business as well as an uncompromised approach to putting our clients' interests first.

Our clients are at the centre of our approach where we attempt to construct sustainable, successful solutions in the key areas of strategy formulation, investment management and administration and reporting.

OUR TEAM

Philip Knibbs
DIRECTOR
BCom, CFP, CFA

Philip has considerable wealth and investment management experience with successful periods at RMB Private Bank and RMB Asset Management before co-founding K2 Capital. Philip assumes executive management responsibility for the firm as well as overseeing the activities of the investment and wealth management teams. Philip manages K2 Capital's ultra affluent, family office client base.

Kim Kennedy
DIRECTOR
BBusSc, CFA

Kim, along with Philip, is co-founder of K2 Capital and has forged a successful career in quantitative analysis and investment management from work experience with Mercury Consolidated Holdings and RMB Asset Management. Kim drives the wealth management research and quantitative modelling at K2 Capital.

Jaco Gous
WEALTH MANAGER
BEcon (Hons), MBA

Jaco is based in Cape Town and heads up the Western Cape representation for K2 Capital. Jaco's extensive investment and wealth management experience was gained from a successful career with RMB Asset Management. Jaco is responsible for servicing K2 Capital's Cape client base and is instrumental in helping formulate the firm's strategic priorities and investment viewpoints.

Tanya Micali
WEALTH MANAGER
BCom (Hons), CFP,
HDip Investment Planning

Tanya has been involved in financial services most of her career and specialised in the marketing and distribution of investment products at both Investec Management Services and RMB Asset Management before starting her own financial services practice in 2007.
In 2010 K2 Capital acquired Tanya's business and she currently provides a highly skilled wealth management service to our clients.

Teresa Cross
WEALTH MANAGER
Advanced CFP

Teresa has 19 years financial services industry experience. Teresa joins K2 Capital from Citadel Investment Services where she looked after the wealth management needs of high net worth clients. Her K2 Capital clients continue to draw on her experience in wealth management, tax, estate planning, and property acquisition and management.

Michelle Jerling
ANALYST
BCom, CIPM

Michelle commenced her career at RMB Private Bank in a wealth management support role before joining RMB Asset Management as a performance analyst. More recently she was employed as an investment reporting specialist at Investment Solutions. Michelle provides critical support across the entire business in her role as a research analyst and reporting specialist.

Shantelle Kotze
OPERATIONS

Shantelle, based in Cape Town, provides client servicing and operational support to the business. Shantelle has extensive administrative and technical experience and remains a key point of contact for many of K2's clients.

Petro Gous
OPERATIONS

Petro is based in Cape Town and provides additional operational support to the team. Petro's warm personality and strong client service standards provide a solid foundation for her support role across all areas of the business.

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