

24 July 2017

Equity Trustees appointed RE to Brisbane boutique fund Pentalpha

Equity Trustees has been appointed the responsible entity (RE) for Pentalpha, a 100 per cent staff-owned, Brisbane-based investment manager offering a high yield, low volatility Australian share fund.

Called the Income For Life Fund, its key objectives are capital preservation, an attractive yield (including franking) and capital growth. It also focuses on investors who are not liable for tax.

As Australia's first growth annuity fund it is primarily structured for the conservative wholesale/retail/institutional investor looking for defensive exposure to high yielding Australian shares and who can use franking credits.

To achieve this investment target, Pentalpha invests in high quality, good value shares and exchange-traded options in a portfolio of between eight and 20 companies.

"Pentalpha is building a strong reputation since launching its Income For Life Fund, the first of its kind in the Australian market," said Harvey Kalman, Executive General Manager, Corporate Trustee Services, Equity Trustees.

He said Pentalpha's decision to choose Equity Trustees as its RE is due recognition of the professionalism, industry experience and skill set we offer a boutique fund manager that needs to remain focussed on its investment strategy.

"It's an efficient choice for a boutique fund manager with a short history. Pentalpha have bought decades of expertise and experience with the additional benefit of drawing clear boundaries between the role of a fund manager and its fiduciary responsibilities in appointing us as independent RE," concluded Mr Kalman.

Equity Trustees was established in 1888 for the purpose of providing independent and impartial Trustee and Executor services to help families throughout Australia protect their wealth. As Australia's leading specialist trustee company, we offer a diverse range of services to individuals, families and corporate clients including asset management, estate planning, philanthropic services and Responsible Entity (RE) services for fund managers.

EQT Holdings Limited is a publicly listed company on the Australian Securities Exchange (ASX: EQT) with offices in Melbourne, Bendigo, Sydney, Brisbane and Perth.

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