

# IPO Wealth

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## IPO Wealth Fund attracts \$50 million in investments and is well on way to \$100 million

IPO Wealth Fund has passed the milestone of \$50 million in investments since it was established in March 2017 and is well on track to exceed \$100 million by the end of the year.

For investors seeking an attractive steady income stream, the IPO Wealth Fund is attracting a lot of interest and achieving strong growth.

### Shift of trust away from banks

This is strengthened by a shift of trust away from banks due to low interest rates, a lack of focus on wholesale and sophisticated investors, and the Royal Commission.

**WATCH:** IPO Wealth surpasses \$50m and capitalises on shift away from banks

A subsidiary of international investment and corporate advisory group Mayfair 101, the IPO Wealth Fund provides wholesale investors with an opportunity to achieve investment returns via term-based investment options.

### "Attractive alternative"

IPO Wealth managing director James Mawhinney said investors considered the fund an attractive alternative to investment property, stock market investments and traditional bank-issued term deposits.

He said, "The banking sector is predominantly tailored towards retail investors, leaving high net worth investors with a disproportionately low level of returns and/or customer service relative to their investment amounts.

"We recognise that this is a shortfall in the existing banking system.

"We developed the IPO Wealth Fund to provide investors with target returns that are higher than inflation for a start and certainly a lot more attractive than other available options."

The IPO Wealth Fund offers six different investment options ranging from terms of 3 to 60 months.

Most popular with investors is the 12-month investment option offering an annual target income return of 4.45%. Like with all investments, investors should consider the risks outlined prior to making an investment in the fund.

### Share Information

**Code:** IPOoo

**Listing:** PRIVATE-AU

**Sector:** Equity Instruments

**Website:** [www.ipowealth.com.au](http://www.ipowealth.com.au)

### Company Synopsis:

*IPO Wealth provides attractive term-based investment solutions for wholesale investors ranging from 3 - 60 months. You can start with as little as \$100,000 with no setup fees. &nbsp; You even have the option to choose between end of term or monthly distributions.*

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Investment amounts accepted from wholesale and sophisticated investors range from a minimum of \$100,000 to a maximum of \$20 million. These investment options are not available to retail investors.

Mawhinney said, "By seeking higher yielding investments around the world, the fund provides investors with the opportunity to earn attractive investment returns with regular monthly distribution payments."

### **Self-funded retirees a major market**

High net worth investors include many self-funded retirees who have accumulated a bit of a nest egg and IPO Wealth Fund is drawing them confidently.

It is also attracting companies frustrated by the lower returns offered by other financial institutions in the current low interest environment.

As well as the higher than average returns and monthly distributions, Mawhinney said the fund's level of service was helping to attract investors.

### **"Super personalised" level of service**

"The fund is super personalised right through to our investors having direct mobile numbers and email addresses of our staff," he said.

"We often fly anywhere in Australia to meet investors face-to-face if they wish.

"This level of service is evidenced in the online reviews we receive, with almost all of these being four or five stars."

### **Investments cover 10 countries**

The IPO Wealth Fund provides a loan, secured by a general security agreement, to Mayfair 101 which deploys these funds in a diverse range of private equity investments around the world.

These investments span 10 countries, and many are focused on socially responsible outcomes.

Mayfair 101 is required to repay the loans together with interest to the IPO Wealth Fund.

Mawhinney said, "Like all investment, investors should consider the risks and the terms of any offer prior to making a decision."

He added, "We are super keen to give the banks a run for their money. They are sitting on several hundred billion worth of term deposits and if we can attract even half of one per cent of that, we have a fund well into the billions of dollars."

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