Holistic Wealth Management

Overberg Asset Management, established in 2001, provides holistic and bespoke wealth management solutions. Whether an individual or entity, we ensure each client is offered a tailor-made solution. We pride ourselves on excellent client service, and expert advice.



overberg
asset management

*the **view** matters*

Reg. No. 2001/019896/07 Authorised Financial Services Provider: 783.

OUR SERVICES

GLOBAL INVESTMENTS

We offer a comprehensive range of global investments including the Overberg Global Private Share Portfolios containing closed-end investment companies listed on the LSE and various other asset classes, Offshore Unit Trusts and Structured Products.
Our asset management team focuses on ensuring investment diversification, investment choice, currency protection, and financial growth.

LOCAL INVESTMENTS

Overberg Local Private Share Portfolios consist of South African investments; however, they provide indirect offshore investment exposure by leveraging multinational companies and ETFs. Additional diversification is provided through select South African Unit Trusts.

RETIREMENT PLANNING

We offer tailored retirement solutions designed to meet your unique needs, whether you're seeking a local or offshore retirement strategy. Our Wealth Managers are specialists in tax efficient overseas trusts, pensions, and other products. We efficiently manage the underlying investments to secure your financial future.

RISK PRODUCTS

Managing one's financial risk is vital to preserving wealth. We offer the risk cover you need - Life, Illness, Disability, and Key Person Insurance.

ESTATE PLANNING

Our distinctive local and offshore solutions will benefit your beneficiaries. Your dedicated Overberg Wealth Manager will ensure your estate is structured efficiently to create a solid foundation for future generations.

ESTATE ADMINISTRATION

We facilitate holistic fiduciary solutions including drafting of Wills, formation/management of Trusts, and Estate Administration services.

TAXATION

We provide tax guidance in respect of our wealth management services through our partnership with trusted professional tax practitioners.

FOREIGN EXCHANGE

Our foreign exchange partners can assist you with the efficient global transfer of funds.



Overberg Asset Management (Pty) Ltd

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