



PERCAPITA

DON'T JUST **INVEST.**
UNDERSTAND.

FINANCE, MADE PERSONAL.





Money is more than numbers.

A salary. A business. An investment.
A home. A family. A dream.

They all mean something different to the person behind them.

"That meaning" is the part of finance we care about.

We don't start with – "What should you invest in?"

We start with – "What are you trying to build?"

We look beyond the numbers. We understand your context and what you're building towards.





Why **PERCAPITA?**

Per capita literally means **per person**.

Finance has spent enough time talking about populations, averages and percentages. We wanted to bring it back to the individual.

PER PERSON.
JOURNEY.
DREAM.

Per “what’s next”.

Because your financial life is “**personal**”.



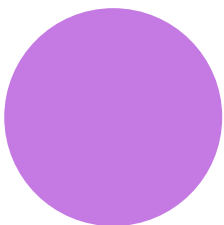


There's no universal definition of "doing well."

For some, it's building a business or buying a home. For others, it's freedom, travel, or a second career. Sometimes, it's just knowing you're on the right track.

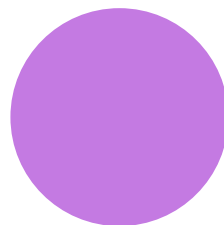
Your priorities change. Life changes. Markets change. Your financial thinking should be able to adapt with it.

We focus on clarity, context, and decisions that make sense for your journey.



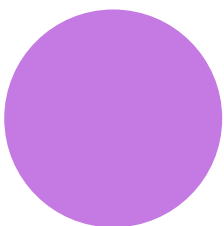
CLARITY

We make complex financial ideas easier to navigate.



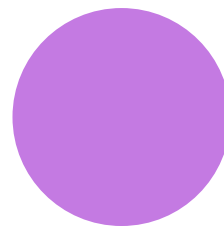
INDEPENDENCE

Our approach starts entirely with your interests.



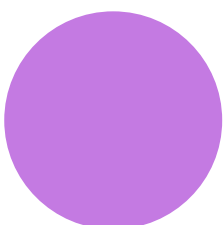
PERSPECTIVE

We look at decisions in the context of your wider life.



CONTINUITY

Your financial life evolves. The conversation stays open.



EXPERIENCE

Decades of collective experience across financial planning and investment advisory.





PERCAPITA



**We
connect
the dots.**



Your finances don't happen in separate tabs. Investments affect liquidity. Tax affects returns. Risk affects plans.

Today's choices affect tomorrow.

We bring the pieces together from investments and tax to risk, retirement, and succession. We look at the bigger picture before helping you decide what comes next.

See the whole picture.

Understand the moving parts.

Make informed decisions.





INVEST

Build and manage your investment strategy with context, not just products.

Mutual Funds • SIFs
• PMS • AIFs

