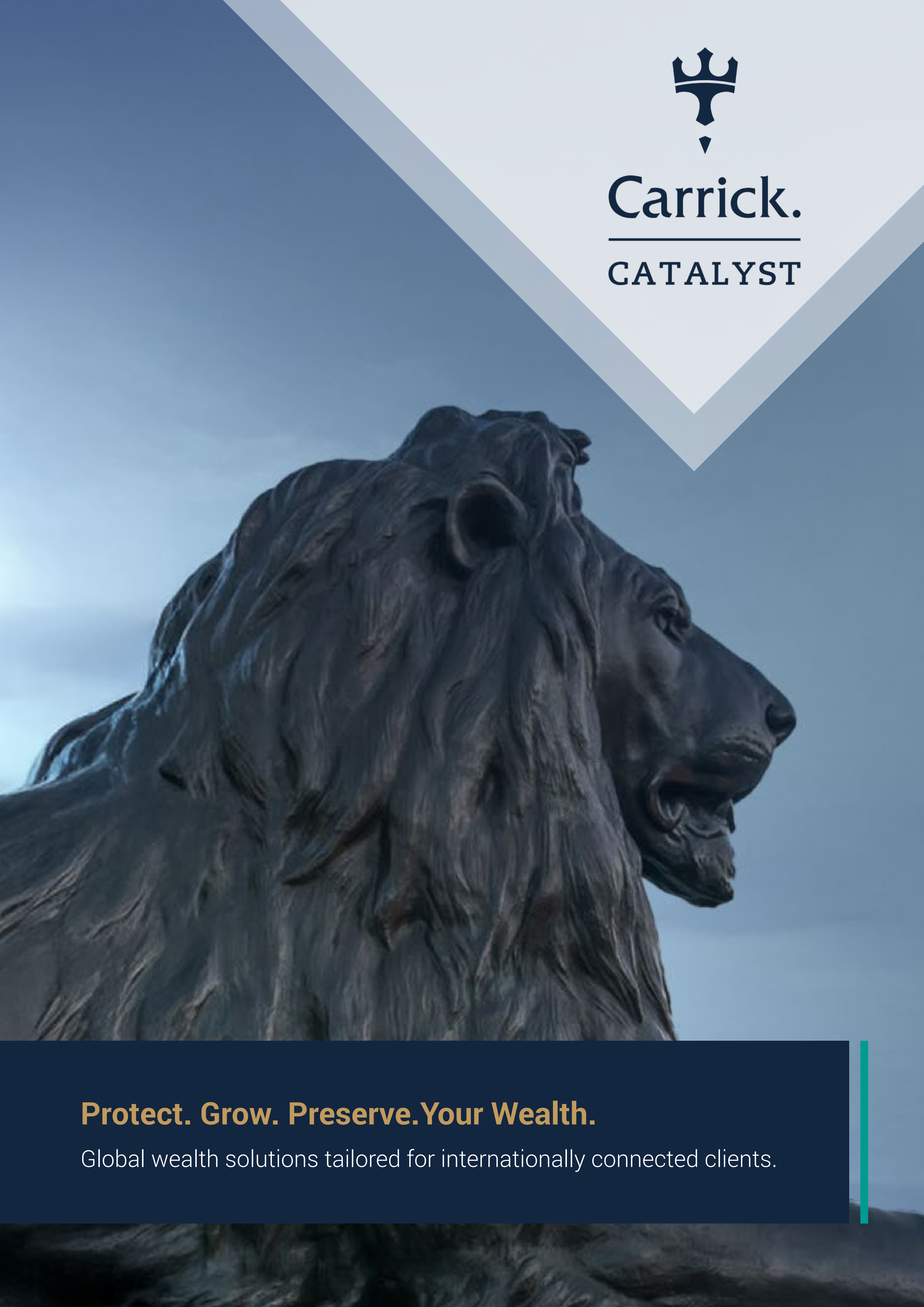

Carrick.

CATALYST

Protect. Grow. Preserve.Your Wealth.

Global wealth solutions tailored for internationally connected clients.

At Carrick Catalyst, we focus on delivering bespoke, internationally relevant wealth solutions designed for today's globally minded clients.

Operating from Mauritius, a leading international financial centre, we provide objective, personalised advice supported by robust governance and globally recognised regulatory standards.

Through our position as Independent Financial Advisers and Wealth Managers, we provide you with impartial guidance and access to internationally regulated platforms, funds, and investments that diversify your portfolio away from the risks and instability of local currencies.

Our strategic partnerships with industry leaders in foreign exchange, tax, international property, offshore banking, and trusts ensure that we cater to both your offshore and local investment needs with the highest levels of service. We believe that no one is better placed to help you grow your wealth, protect it, and preserve it for the future you envision.

WHAT CARRICK **OFFERS**

OFFSHORE EXPERTISE

We are experts in offshore wealth management solutions, with an extensive global network of investment partners.

ESTABLISHED & EXPANDING

Our business is well-established in Africa and fully licensed in South Africa, Namibia, Zimbabwe, and Mauritius, where we hold three global business licenses.

HOLISTIC APPROACH

Our value propositions include a diverse range of financial solutions, including property, fiduciary, offshore and onshore offerings. Our holistic approach addresses all your financial needs.

PRODUCTS & SERVICES

In a world where markets shift rapidly, agility and trust are paramount, an ability to pivot and seize new opportunities ensures that the company can continue delivering value and peace of mind, no matter the circumstances. From our base in Mauritius and backed by three global licences, **we provide specialist guidance in financial planning, offshore structuring, and exclusive investment solutions to clients worldwide.** We can help you manage and grow your wealth - across borders, asset classes, and generations.

Carrick Catalyst delivers carefully structured, cross-border wealth solutions aligned to each client's personal, family, and international objectives. Mauritius combines **regulatory strength, investor protection, global connectivity, and lifestyle appeal** - making it one of the most respected international financial centres for wealth management and structuring.

With a stable economy, investor-friendly tax regime, and strong global treaties, it offers a secure base for wealth structuring making it a **trusted choice for internationally minded investors and families.** The jurisdiction is fully compliant with international standards, giving you confidence in its governance and transparency.

Beyond finance, Mauritius provides modern infrastructure, residency options, and a relaxed island lifestyle… ideal for those seeking both opportunity and quality of life. It's not just where you invest, **it's where your legacy takes root.**

Services include:

- Offshore Investment Solutions
- Education Planning
- Wealth Building Strategies
- Life Cover & Business Risk Management
- Retirement & Succession Planning
- International Property

All advice is tailored, transparent, and supported by rigorous due diligence and global partnerships.

WHY CLIENTS PARTNER WITH CARRICK

Our client service model is built on three pillars: clarity, consistency, and care.

From the moment we begin working together, we guide you through a discovery-led process that explores your goals, family dynamics, international exposure, and risk tolerance, ensuring every recommendation is tailored to your unique circumstances rather than driven by products.

We deliver excellence through measurable service standards, technology-enabled execution, and proactive communication that keeps you informed at every step.

Your dedicated Private Wealth Manager, supported by a skilled service team, provides you with multi-contact access and regular, plain-language updates that build trust and continuity across all our interactions.

Underpinned by rigorous governance, transparent fee structures, documented advice, and a commitment to continuous improvement, we ensure every touchpoint is timely, transparent, and outcomes-focused. Whether you're navigating complex succession issues across multiple African markets or accessing global investment solutions, we're here to make you feel confident, informed, and cared for at every moment that matters.

INVESTMENT **EXPERIENCE**

The investment backgrounds and investment experience of the Carrick Group are vast and diverse. Our leadership have operated through significant market crashes starting with the Russian crisis in 1998 as well as various interest rate regimes and market cycles. We have seen fortunes lost and fortunes made and apply the valuable lessons learned in our investment philosophy.

The Carrick Investment Committee continually seeks to expand our global partnerships and evaluate emerging products to enhance our wealth management solutions and conducts full due diligence on all potential providers to ensure they meet our high standards for transparency, consistency, track record and reputation.

AN **AWARD-WINNING** ADVISORY

2025

IIA | Excellence in Advisory Best Practices (Africa)

IIA | Excellence in Client Services (Africa)

Krutham Awards | Ranked 3rd in Top Wealth Manager: Boutiques

IA 100 Industry's Most Influential | CEO, Craig Featherby and MD (SA), Rashay Makan, ranked in Top 100

2024

IIA | Excellence in Advisory Best Practices (Africa)

Krutham Awards | Ranked 3rd in Wealthy Family Archetype

2023

IIA | Excellence in Advisory Best Practices (Africa)

IIA | Excellence in Client Services (Africa)

IA Awards | Best Adviser Firm in South Africa

IA Awards | Excellence Business Strategy

IA Awards | Excellence in Professional Development

IA Awards | Excellence in Investment Planning

IA Awards | Excellence in Diversity

2022

IIA | Excellence in Advisory Best Practices (Africa)

IIA | Excellence in Client Services (Africa)

IA Awards | Best Adviser Firm in South Africa

IA Awards | Excellence Business Strategy

IA Awards | Excellence in Professional Development

IA Awards | Excellence in Marketing

IA Awards | Excellence in Diversity

IA Awards | Excellence in Digital Innovation

IA Awards | Best Support Team

2021

IIA | Excellence in Advisory Best Practices (Africa)

2020

IA Awards | Best Adviser Firm in South Africa

IA Awards | Excellence Investment Planning

IA Awards | Excellence in Business Strategy

Intellidex | Carrick Wealth ranked 1st in Wealthy Executives Archetype

Intellidex | Carrick Wealth ranked fourth in Top Wealth Manager: Boutiques

IA 100 Industry's Most Influential | CEO, Craig Featherby ranked in Top 100

2019

IA Awards | Best Adviser Support Team

IA Awards | Excellence in Marketing

Intellidex | Carrick Wealth ranked in Wealthy Executives Archetype

IA 100 Industry's Most Influential | CEO, Craig Featherby ranked in Top 100

2018

IA Awards | Excellence in Business Strategy

IA 100 Industry's Most Influential | CEO, Craig Featherby ranked in Top 100

2017

IA Awards | Excellence in Client Services

IA Awards | Excellence in Marketing & Client Engagement

2016

IA Awards | Excellence in Business Transformation

IA Awards | Excellence in Investment Planning

International Advisor Best Practice Advisor Awards (IA Awards)

The IA Awards were established in 2016 to celebrate excellence among international advisers. They focus on those serving high-net-worth clients with cross-border insurance, investment, banking, and pension products. The awards recognise achievements across all areas of advisory business.

Investment International | International Investment Awards (IIA)

The IIA Awards are one of the longest-running and most prestigious events in UK and global wealth management. With over 30 categories, they honour excellence across sectors like fintech, trusts, IMPI, and private banking. These awards continue the legacy of the International Investment Awards, now spanning over 25 years.

Krutham | Intellidex Top Private Banks & Wealth Managers

Launched in 2012 and rebranded in 2024, the Krutham Awards highlight top-performing South African private banks and wealth managers. Winners are determined through a comprehensive survey of firms and clients. The awards place strong emphasis on client satisfaction across a wide range of service categories.

CARRICK GROUP **CORE VALUES**

Transparency

We maintain transparency in all areas of the business, promote an open door policy and ensure complete access to information. We believe providing access to information removes bureaucracy and promotes creative decision making.

Agility

We promote individuals and their interactions over process, thus allowing flexibility, resulting in a personalised culture and customer experience. **Moving swiftly is important to us** as we compete against industry giants.

Excellence

We don't do everything, however what we chose to do makes an impact, is scalable and profitable. As such **we strive for excellence in the work that we do** and hold ourselves accountable to deliver in a manner that represents performance excellence.

Continuous Learning

Growth is at the core of how we measure success, for our team and our clients. We are only able to push boundaries and grow as an organisation if we focus on people development and growing internally. We believe curiosity is at the core of personal development and aim to promote curiosity throughout the organisation.

Customer Success

Achieving superior outcomes for clients is at the core of Carrick's value proposition and achieving this consistently, builds client loyalty. We believe achieving customer satisfaction begins with the embodiment of a positive attitude and hence we aim to foster an environment where positivity thrives.

Humility

Being humble promotes open engagements resulting in new ideas and creative thinking. We steer clear of false pride and guard against arrogance to allow for space to always advance. We are aware our success is a result of rigorous consistency and are always willing to learn more.

THE CARRICK DIFFERENCE

What sets Carrick apart is more than a decade of proven trust, consistent client retention, and a relentless focus on your legacy.

Carrick Catalyst combines international structuring expertise with regional understanding to deliver solutions that stand the test of time. Based in Mauritius and serving globally mobile clients, we help you navigate complexity with confidence, not just managing wealth, but enabling a lasting financial legacy aligned to your values.

Our culture of excellence runs deep; from rigorous compliance and continuous professional development to estate planning, succession strategies, and wealth structuring designed to endure beyond generations. We don't simply manage your wealth; we partner with you to build a financial legacy that reflects your values, protects your family, and stands the test of time.

When you choose Carrick, you're choosing a trusted adviser committed to guiding you toward the future you've worked so hard to create.

Carrick.

CATALYST

CARRICK CATALYST

+23 (0) 215 2996 | info@carrick-catalyst.com | **www.carrick-catalyst.com**

Suite One, 1st Floor MCBQiQ, 1207-2 Royal Road, Pointe aux Cannoniers, 30523, Mauritius