

3rd March 2009

Principal Investment Management's Neil Whelan wins two SII Awards

Neil Whelan, from Paddock Wood in Kent, who works for Principal Investment Management, the private client portfolio management specialist, was awarded with the ultimate accolade at this year's Securities & Investment Institute (SII) Ceremony, by winning two awards.

Neil received an award for the 'Investment Analysis Unit' and the 'Overall Diploma Prize;' the latter dubbed by the award organisers as the toughest qualification to achieve.

Neil picked up the two awards, which both feature in the SII Diploma category (SII's post-graduate qualification), after gaining the highest marks amongst 48,000 others who sat the SII exams across the 49 participating countries.

The award ceremony was held at Mansion House, home of the Lord Mayor of London, on the evening of Thursday 26th February. Altogether, 45 men and 20 women, representing a range of firms, took to the stage to receive their awards.

Commenting on his award wins, Neil Whelan said: "I'm delighted to have won these awards. The SII awards are very well respected throughout the investment industry, so to win one would have been great, but to win two is absolutely fantastic! It's a great accolade, and something I'm very proud of."



www.principalinvestment.co.uk

PRINCIPAL INVESTMENT MANAGEMENT LIMITED

16 SOUTH PARK SEVENOAKS KENT TN13 1AN
TEL: 01732 740700 FAX: 01732 740287 (Registered and Head Office)

MANSION COURT 25 WATLING STREET LONDON EC4M 9BR
TEL: 020 7367 9400 FAX: 020 7367 9500

5 MILES'S BUILDINGS GEORGE STREET BATH BA1 2QS
TEL: 01225 460010 FAX: 01225 446434

Founded over 20 years ago, Principal specialises in discretionary portfolio management for private individuals, family trusts and smaller corporate clients. Since that time, it has built up a strong team of employees. Principal now has over 90 employees spread across three offices in London, Bath and Sevenoaks, managing approximately £800 million on behalf of its clients.

In March 2008 Principal became a member of the Sanlam Group, a leading South African financial services business. The deal with Sanlam has allowed Principal access to a broader range of investment capabilities and has given Sanlam the opportunity to build and develop its presence in the UK.

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For further information, media enquiries or images please contact:

David Barrett or Louise Findlay-Wilson
Energy PR
Tel: +44 1993 823 011
david@energypr.co.uk or louise@energypr.co.uk

Or

Adrian Jewitt, Sales & Marketing Director
Principal Investment Management Limited
Tel: +44 (0)20 7367 9400
e-mail: adrian.jewitt@principalinvestment.co.uk

Notes to Editors

Principal Investment Management Limited

Principal is one of the leading private client investment companies in the South of England. Founded in 1987, it now employs around 90 people in its offices in Sevenoaks, London and Bath. It looks after some £800 million on behalf of its clients. It specialises in discretionary portfolio management for private individuals, family trusts and smaller corporate clients.
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The Sanlam Group

Sanlam is a leading financial services group in South Africa, listed on the JSE and Namibian stock exchanges. The Group comprises a number of mutually dependent business entities focusing mainly, but not exclusively, on wealth creation and protection, investment management and ancillary financial services solutions for individuals and institutions. Apart from the UK, the Group has business interests elsewhere in Africa and in India. On 31 December 2007, the Group had assets under management in excess of R525 billion and an employee base of 9,000. www.sanlam.co.za.

Sanlam UK

Sanlam has consolidated the reporting of its UK interests into a single reporting entity to ensure co-ordinated development of its growing portfolio of financial services businesses operating in distribution, packaging, administration and asset management services. Sanlam UK Limited consists of Sanlam's subsidiary companies Merchant Investors (100% owned), Principal Investment Management (86%) and Buckles Holdings Limited (60%). Sanlam has minority holdings in Intrinsic, Nucleus and the Punter Southall Group.

The SII

The Securities & Investment Institute (www.sii.org.uk) was formed in 1992 by members of the London Stock Exchange. Its mission is to set standards of professional excellence and integrity for the securities and investment industry, providing qualifications and promoting the highest level of competence to its members, firms and others. The Securities & Investment Institute is now the pre-eminent professional body for those who work in the securities and investment industry in the UK. Over 40,000 members benefit from a programme of professional training and development. The Institute is the principal awarding body for industry qualifications and last year its examinations attracted 40,000 candidates.

