PRINCIPAL
Investment Management Limited

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

June 2009

Principal Investment Management Unveils New Toolkit for IFAs

A groundbreaking 'toolkit' helping IFAs pinpoint specific high net worth individuals in their region, is to be launched by Principal Investment Management at a series of free seminars next month.

The package – which focuses on three particular groups of the high net worth community – is designed to help IFAs by offering key insights, practical guidance on creating key prospect databases, and marketing materials in order to target these types of clients.

Private client portfolio management specialist, Principal, will host three free seminars – entitled "Profitable Know-how" – on the 7th, 8th and 9th of July in London, Bristol and Kent respectively.

Adrian Jewitt, Principal's Sales and Marketing Director, said: "While everyone is telling IFAs they must get smarter at segmenting the market place and tailoring their offer, no one is showing them how – or equipping them to do it. These seminars will offer practical guidance on segmentation techniques.

"We will be unveiling new analysis of three of the most financially active segments within the high net worth community of whose behaviour we have expert understanding and knowledge. We will also be arming those who attend with free, practical toolkits which can immediately be put to use to help target these critical client groups."

According to research, 30% of firms say client segmentation is a real priority, whilst half of IFAs are predicted to be focusing on giving one-to-one advice to high net worth individuals by 2012*. And with revenues under pressure, IFAs must master the art of selling to affluent customers.

Principal will show attendees how to identify the needs and preferences of one affluent person from another, how to recognise those most likely to respond to their services, and how to approach them.

During the seminars, IFAs will be provided with all the know-how they need to help build more business. Topics include:

. What motivates each of these three distinct groups

. What they could be worth to an IFA's business

. Their investment levels, plans and preferences

. How to spot them in your territory

. How to physically locate each and every one of them

. Then how to approach them

. What they will need – and the triggers that will turn them into clients

Attendees will also be presented with an opportunity to meet Principal Investment Management's new Chief Executive, Hugh Titcomb, who joined in April from The Ansbacher Banking Group. In addition, one of Principal's Senior Investment Managers will be in attendance, sharing the latest thinking on the opportunities in the changed investment landscape.

The free seminars will be taking place on Tuesday 7th July (London Home House Club), Wednesday 8th July (Brunel's ss Great Britain, Bristol) and Thursday 9th July (Brands Hatch Racetrack, Kent). Each seminar will start at 9.30am and will be finishing at 12pm. Seats for the seminars are strictly limited, so people are urged to book early. If you would like to do so, or find out more about the events then please do not hesitate to phone Principal Investment Management on 01732 740700 and reference the Channel Story.

**Source: 1st – The Exchange*

-ends

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. In March 2008, Principal became part of the Sanlam Group. www.principalinvestment.co.uk
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.