



# Private Wine Collections

## by ChapmanCraig Limited

# Fact Sheet

### General Description

For private collectors, ChapmanCraig Limited (CCL) offers tailor-made fine wine collections. Collections include wines chosen according to each client's wishes (keep, drink, trade...) and preference. These valuable assets can include some of the world's most prestigious bottles. CCL acts as an independent advisor and manager. All transactions are made with third party suppliers upon CCL recommendation. CCL's experience and extensive network allow access to top wines at the best prices. Once the collection is completed, clients can decide to extend it, transfer it to another location or have CCL manage it. Valuations are provided throughout the process.

### Process Description

1. The collection objective and investment amount are determined by the collector in consultation with CCL.
2. CCL helps to prepare a target list of wines to be acquired.
3. The final terms are agreed upon.
4. The CCL team assists with the establishment of the collection's administrative details: account name, payment option, storage location.
5. The collection is created over the following few months up to one year.
6. A formal final review takes place when the collection is completed.

Once the process is completed, the client can request that CCL further manage the portfolio, provide regular valuations and/or help shipping wines to a final destination.

### Financial Benefits

The collection objectives are defined early in the process and are usually a combination of lifestyle and financial investment. In any case, all wines purchased are chosen from among those which provide strong potential for appreciation, and that can be acquired for attractive prices. A typical collection is expected to repay the costs (fees and logistics) within the first year and provide attractive appreciation (e.g. 15% p.a. or above) within the following years and in the long run.

### Lifestyle Benefits

Owners of the fine wine collections can enjoy the pleasure of owning a unique set of fine bottles reflecting their personality and preferences. This ownership is materialized by the regular reports, as well as the possibility to receive some of the wines for personal enjoyment at any time – upon request. In addition, CCL holds regular exclusive events (tastings & dinners) in which private clients are invited to take part.

### Manager Profile

ChapmanCraig Limited (CCL)'s vintage wine consultants/managers pioneered and managed Asia's first wine related investment vehicles in both wine funds and private collections. In addition to more than 30 years' experience in managing vintage wine investments and work in the wine trade, their experience includes being a Bordeaux wine-maker over 10 vintages.

### Main Features

**Minimum Investment:**

US\$ 250,000

**Time-frame:**

Up to one year

**Currency:**

US\$ or €

### Costs and Fees

**Manager fee:**

Depending on size of collection

**Other costs:**

- Shipping fees
- Storage fees

→ Other costs are small (<1%)

compared to investment size

Shipping fees are budgeted in the investment amount



### Key Highlights

- Collectors are owners of the bottles from the beginning; CCL only acts as a manager, sourcer and advisor. **All purchases and storage accounts are in the name of collectors.**
- CCL acts **independently from any merchant or seller.**
- Only wines in the **best condition** are purchased and they are **acquired for attractive prices.**