

# WEALTHPORT

## TAX FREE SAVINGS INVESTMENT

A flexible, tax efficient investment available to individuals that are South African tax residents. You may contribute at any time (within the annual and lifetime limits) and structure your investment using any combination of allowed available instruments. You will not be taxed on the growth and income earned in your investment. You may access and withdraw your investment as you wish.

### Allowed Instruments in your Wealthport Tax-Free Savings Investment

- A Tax Free Compliant Model Portfolio investment selection
- A Tax Free Compliant combination of Unit Trust Funds
- A Tax Free Compliant combination of Exchange Traded Funds
- Tax Free Compliant Money Market Funds

### Contributions to your Wealthport Tax-Free Savings Investment

- The minimum amount for the initial investment is R5 000
- The maximum annual contribution amount is R36 000
- The minimum amount for a monthly debit order is R500
- The maximum amount for a monthly debit order is R3000
- The maximum amount for an investment is R500 000 over the investor's lifetime

### Access to your Wealthport Tax-Free Savings Investment

- You can withdraw from your Tax-Free investment after a 30-calendar day clearance period has expired.
- Your Tax-Free Investment is a discretionary investment, meaning that full or part withdrawals can be made at any time after the clearance period has elapsed.
- It is important to note that any withdrawal will affect your lifetime maximum investment limit that remains available to you.
- There are no penalty fees payable should you wish to withdraw from your investment or transfer your investment to another provider.

### What happens to my investment upon my death?

- We will pay the proceeds of your Tax-Free Savings Investment into the account of your estate, as instructed by the duly appointed executor. No beneficiaries can be nominated.

### Additional Information regarding the Wealthport Tax-Free Savings Investment

- Tax certificates indicating your contributions will be provided to you annually.
- Your Tax-Free Savings Investment is not protected against creditors
- The investment returns are not guaranteed, and the market value comprises of the underlying instruments that you have chosen to invest in.

### Your best interest is our priority

It is always important to consult with your Financial Planner and/or a specialist professional to ensure that you understand all the relevant Wealthport and Product terms and any tax related aspects of your investment where applicable.

#### ADMINISTERED BY:

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