

Momentum Wealth: Traded Endowment Option

Live comfortably when you retire with the choice to take money out of your investment if you need an additional income



You've been financially preparing, and now it's time to enjoy your retired life - with a regular income and options to make your money grow as well.

Your savings and investments before you retire should set you up for a comfortable retirement, because once you've retired, you need to make sure that you can get more growth while living off the income you draw from those investments.

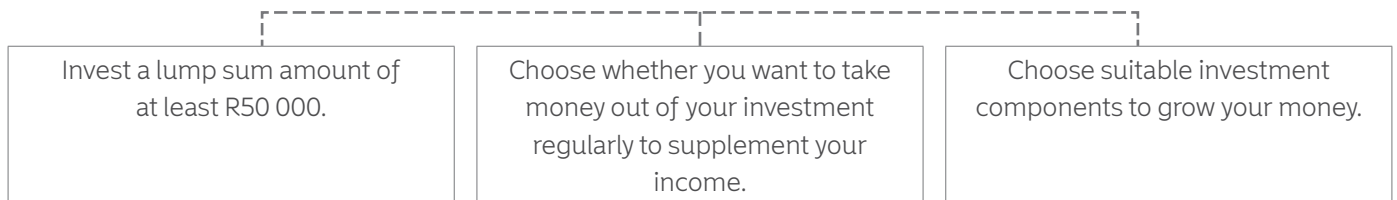
Make your money work for you when you retire

Momentum has different products that you can use to draw an income during your retirement.

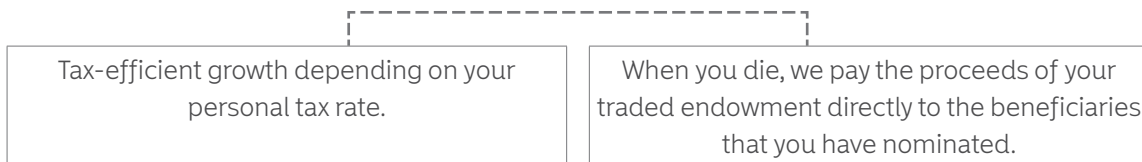
One of these products is the **Traded Endowment Option**, an investment product that may have tax- and estate planning benefits.

Traded Endowment Option

How it works



Benefits



Give your retirement planning Momentum

Momentum Wealth helps you build and protect your financial dreams on your journey to success, whether immediate or over the longer term.

With a world of choice to suit each person's investing needs, your financial adviser can guide you with sound financial planning and advice for your different financial goals.

Momentum Wealth is ideal if you prefer a **flexible approach** to saving and investing. It gives you the freedom to choose how you want to achieve your goals through a comprehensive product range. We have a range of local and global **unit trusts** to suit your personal investment needs and goals. You can also hold different types of investment components managed by other investment managers – an all-in-one convenient solution. Your financial adviser will help you choose the most suitable investment solutions.

The **Traded Endowment Option** is a life insurance product, underwritten by Momentum Metropolitan Life Limited, a licensed life insurer under the Insurance Act and administered by Momentum Wealth (Pty) Ltd.

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