

Momentum Wealth: Flexible Investment Option

Draw an income for your retirement by investing a lump sum or regular amounts and having access to your money



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 **Flexible Investment Option**, an investment product where you can take out some or all of your money whenever you need to.

Flexible Investment Option

How it works

Invest a lump sum amount of at least R50 000, and/or regular amounts of at least R1 000 per month, and add additional amounts at any time.

Choose whether you want to take money out of your investment regularly to supplement your income.

Choose suitable investment components to grow your money.

Benefits

Use interest and capital gains tax exemption to minimise tax payable on your investment.

You can access your money whenever you need to.

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 Flexible Investment Option is a Financial Sector Conduct Authority (FSCA) Category III Administrative financial services provider (FSP) investment product, administered by Momentum Wealth (Pty) Ltd.

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For investments in collective investments schemes (CIS) (unit trusts), refer to the minimum disclosure document (MDD), which is available from the relevant CIS manager. The MDD contains important information about investments in the particular CIS.

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