

Momentum Wealth: Flexible Endowment Option

Invest a lump sum or regular amounts to grow your money so that you have the finances for what you would like to achieve in future



Whether you want to save for a car or that dream house at the beach, you can achieve that goal if you have a financial plan that you stick to.

By doing this, you will be saving and investing regularly because you know what your needs are and what you want to achieve, while building your own future.

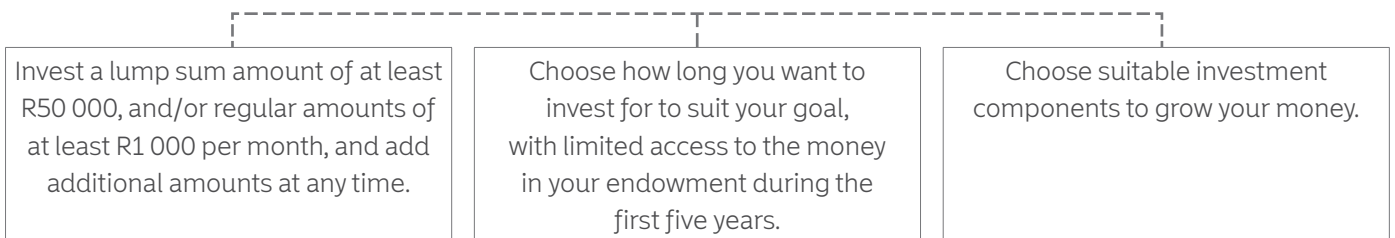
Financial security for your future

Momentum has different products that you can use to save and invest for your future needs.

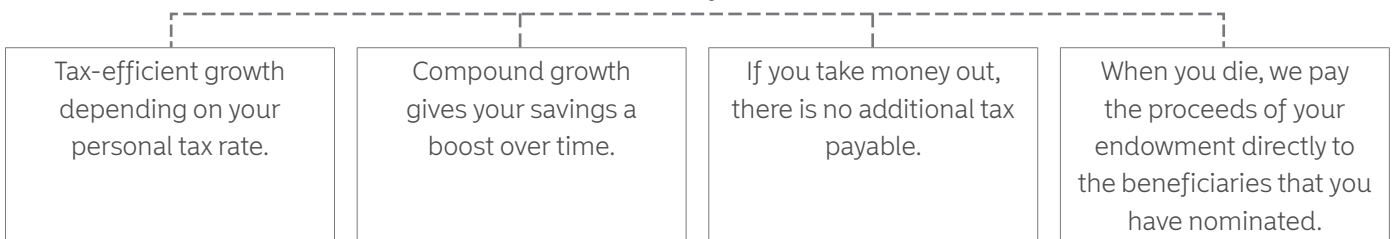
One of these products is the **Wealth Flexible Endowment Option**. An endowment is an investment product with certain rules and restrictions, and it may have tax- and estate planning benefits depending on your circumstances.

Wealth Flexible Endowment Option

How it works



Benefits



Save and invest with Momentum for what you want to achieve in the future

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 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.

The information in this document is for general information purposes and not an invitation or solicitation to invest. The information is not intended to be accounting, tax, investment, legal or other professional advice or services as set out in the Financial Advisory and Intermediary Services Act 37 of 2002 (FAIS), or otherwise. The information in this document, including opinions expressed, is derived from proprietary and nonproprietary sources that Momentum deems reliable. It is not necessarily all-inclusive but is accurate at the publication date. While we make all reasonable attempts to ensure the accuracy of the information in this document, neither Momentum Wealth (Pty) Ltd, Momentum Metropolitan Life Limited, nor any of their respective subsidiaries or affiliates make any express or implied warranty about the accuracy of the information in this document. Past performance is not necessarily a guide to future returns. Financial advisers should conduct a suitability analysis and due diligence with clients on the investments mentioned in this document as part of their investment mandate and investment advice process. Terms apply. Available from your financial adviser and Momentum.

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.

Momentum Wealth is part of Momentum Metropolitan Life Limited, an authorised financial services (FSP 6406) and registered credit provider.

Momentum Wealth (Pty) Ltd is an authorised financial services provider (FSP 657) and part of Momentum Group Limited.

momentum.co.za