

Momentum Wealth: Flexible Investment Option

Save and invest in a flexible manner as your money grows with the peace of mind that it is still available if you need it



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 **Flexible Investment Option**. This is an investment product where you can take out some or all 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.

Keep your money invested until you achieve your goal.

Choose suitable investment components to grow your money.

Benefits

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

You can access your money whenever you need to.

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 hold different types of investment components managed by different investment managers, both locally and offshore – 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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