

# Nedgroup Investments

## Tax-Free Investment



### Characteristics

A tax-free investment is a flexible unit trust investment that:

- Offers tax-free investment returns;
- Is exempt from tax on dividends, interest earned and capital gains;
- Has a maximum investment amount of R36 000 per year or R500 000 over a lifetime;
- Imposes penalties if investment contributions maximums are exceeded; and
- Allows access to investment at any time (subject to contribution limits).



### Benefits

The Nedgroup Investments Tax-Free Investment offers investors:

- Access to a wide range of Nedgroup Investments funds;
- Flexible payment options; and
- No causal event fees or penalties.



### Who should consider this investment?

The Nedgroup Investments Tax-free Investment is a product that should be considered by any investors who:

- Want to generate tax-free capital growth on their investment;
- Intend to save for the long-term but want immediate access to funds in an emergency;
- Want to choose the frequency and size of payments; and
- Want access to a range of underlying investment options.