

# WEALTHPORT

## WEALTHPORT PRESENTS THE GLOBAL DEFINED RETURNS RETIREMENT PROTECTOR

Dear Financial Advisor






Globally, investors are looking to diversify their investment portfolios and benefit from the growth potential of global stock markets, whilst minimising the risk of losing their capital and eliminating the risk of zero returns.

Wealthport is proud to present, in partnership with ABSA & 1Life, the first structured product available for purchase within a Living Annuity.

The Global Defined Returns Retirement Protector offers you attractive fixed returns, and at the same time the benefit of geared exposure to any positive growth of global stock markets, all in one single fully capital-protected South African rand (ZAR) investment. In addition, it also offers some exposure to the ZAR/US Dollar exchange rate on any growth at maturity.

The Investment is available exclusively in a Wealthport Market Linked Living Annuity policy.

### KEY BENEFITS:

-  25% of the initial investment amount earns a fixed return of 18.8% (simple), paid into the policy after 1 year
-  Another 25% of the initial investment amount earns a fixed return of 38.8% (simple), paid into the policy after 3 years
-  The remaining 50% of the initial investment amount will be allocated to an Equity Index Investment for 5 years
-  Some exposure to foreign currency
-  100% Capital protection, if held to maturity

The security afforded to you on this investment, is encompassed in the relationship between the partners.

- 1Life, the number one direct life insurer in South Africa, is the underwriter of this product.
- ABSA, one of the top four banks in South Africa is the issuer, product provider and guarantor of the product, and
- Wealthport, recently recognised as the Best Linked Investment Service Provider (LISP) platform, for 2017 and 2018 at the Annual Africa Structured Products and Alternative Investments Awards, is the company administering the product.

**Application Open Date:** 30 March 2020

**Application Closing Date:** 15 May 2020

**Investment Date:** 22 May 2020

### Wealthport take-on and investment requirements:

- The Wealthport Market Linked Living Annuity policy must have a total minimum market value of R2 000 000
- The minimum investment amount for this product is R500 000
- A maximum of 25% of the total market value in the policy is permitted to be invested in the Structured Product
- Clients with annuity drawdown percentages of up to a maximum of 13.125% are permitted to invest

### Required Documentation:

#### For existing Wealthport Market Linked Living Annuities:

- Wealthport Switch Form
- Signed ABSA Term Sheet

#### For new Wealthport Market Linked Living Annuities:

- Wealthport Market Linked Living Annuity Application Form
- Signed ABSA Term Sheet
- FICA as per FICA requirement list (attached)
- Transfer In Documentation for a section 37 or Retirement Transfer In

### Important Information:

- Wealthport requires all transfers in to have been completed, with the funds invested and settled in the new Wealthport Market Linked Living Annuity by 15 May 2020.
- Whilst Wealthport will do everything we can to ensure that there are no delays with transfers coming in, Wealthport relies on the efficiencies and turn-around times of third-party providers, and cannot be held liable should any transfers not be finalised prior to the cut-off date.
- The mechanics of how the investment works are discussed in further detail in the brochure attached. Please read it carefully, together with the investment schedule and terms and conditions, to ensure that you understand them before investing.

### Contact Us:

Please contact your Wealthport Business consultant if you have any questions or require assistance. Wealthport Business Consultants contact information:

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