

ZERO TAX RATED INVESTMENT*

ANCHOR

Hollard.
investments

In partnership with **Hollard Life Assurance Company Limited**, we're offering a Linked Endowment that allows you to access every Anchor investment product, at a **0% tax rate***

LOCAL
SHARE
PORTFOLIOS

OFFSHORE
SHARE
PORTFOLIOS

UNIT
TRUSTS

HEDGE
FUNDS

FIXED
INCOME
FUNDS

AT A **0%** TAX RATE*

The Hollard Linked Endowment is subject to taxation according to the "Four Funds" tax method applicable to South African Long Term insurers, according to section 29A of the Income Tax Act of 1962. Hollard offers reduced tax recovery charges to investors by using our assessed tax loss. This advertisement does not constitute tax, legal or accounting advice. Potential investors should seek their own legal and tax advice where required.

ENHANCE YOUR AFTER-TAX RETURNS

WHY ANCHOR?

One of SA's **top private wealth managers** with a complete range of investment options



R46 billion of assets
under management
and advice



Listed on
the JSE

PRODUCT FEATURES

✓ Create multiple policies for added **liquidity**

✓ Enjoy the freedom of an **open-ended endowment** – no fixed term

✓ **Eligible investors** include natural persons and trusts (where beneficiaries are natural persons)

✓ **Estate planning made simple:** typically exempt from executor's fees. (normally 3.99%)

WHY HOLLARD?

As SA's largest privately owned insurance group Hollard brings a **healthy balance sheet** with a capital adequacy ratio of 3.7



5 Million clients



Assets exceed
R26 billion

CONTACT US TODAY



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Anchor Capital is an authorised Financial Services Provider FSB # 39834

The Hollard Linked Endowment is underwritten by Hollard Life Assurance Company Limited (Registration Number 1993/001405/06) an authorised Financial Services Provider.

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LINKED ENDOWMENT FEE

0,99% p.a.

Minimum investment of R100 000

Linked endowment fee excludes any investment management and advice fees.

* Dividend Withholding Tax remains at 20%

Collective Investment Schemes (CIS) in securities are generally medium to long term investments. The value of participatory interests may go down as well as up and past performance is not necessarily a guide to the future. All CIS are traded at ruling prices and can engage in borrowing and scrip lending. A schedule of fees and charges and maximum commissions is available on request. Forward pricing is used. Fluctuations or movements in exchange rates may cause the value of underlying international investments to go up or down. The Manager reserves the right to close and reopen certain portfolios from time to time in order to manage them more efficiently. This document should not be seen as an offer to purchase any specific product and is not to be construed as advice or guidance in any form whatsoever. Investors are encouraged to obtain independent professional investment and taxation advice.