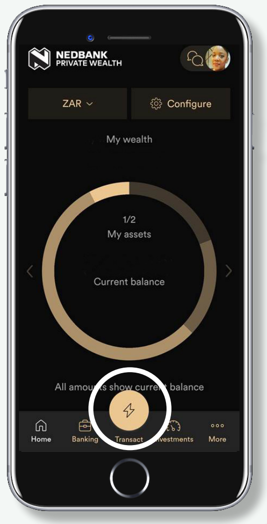
Tax-free investments on our app

Investing tax-free is a great way to make every rand count and to maximise the growth on your savings. With our app, investing is quick and effortless, with no paperwork or extra admin.

Open a new tax-free investment on your phone and have the peace of mind that your money is working hard to maximise your savings. Follow the steps below to benefit.

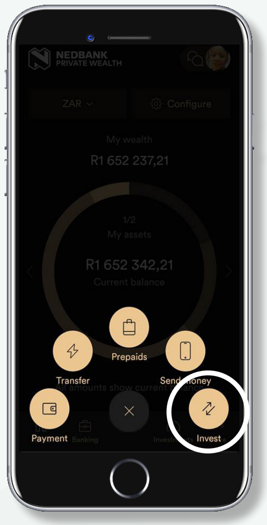
1 Transact

Once you have logged in, click on 'Transact' on the home screen.



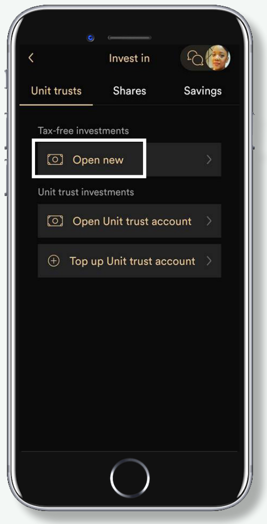
2 Invest

From the pop-up menu, select 'Invest'.



3 Open new

The 'Invest in' screen will open. From the 'Unit trust' menu, click on 'Open new' under 'Tax-free investments'.



4 Specify source

The 'Income and tax details' screen will open. Please specify the source of the money you are investing and your occupation and click on 'Continue'. (This is for FICA purposes, for your and our protection.)

5 Specify amount

The 'Open unit trust account' screen will open. Please specify the lump sum and/or debit order amount and when you want to invest and click on 'Continue'.

6 Specify fund

The 'Investment details' screen will open, showing four funds. Please specify:

- in which funds you want to invest; and
- how much you want to invest in each fund

and click on 'Continue' to complete your transaction.

How tax-free investments help you maximise your savings.

- You don't pay South African tax on any of the investment proceeds: income, interest, capital growth or dividends.
- All income generated can be reinvested into the tax-free investment without incurring any South African tax liabilities.
- The only fee is the annual management fee – there are no upfront, switching or exit fees.

You can download the app for free from the Apple and Android app stores.

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