



Namibia Flexible Investment

Build your wealth and access funds when you need it.

The Namibia Flexible Investment allows you to build your wealth and gives you the flexibility to make additional contributions or access your funds when you need it. You have total control over your investment allocation through a range of local and international unit trusts.

momentum

Who can invest?

The Namibia Flexible Investment is available to Namibian residents, individual investors, trusts, companies, close corporations and non-taxable entities.

This product is suited for you if:

<input checked="" type="checkbox"/>	you want the flexibility of choosing when to stop, start or change your investment contributions without any penalties;
<input checked="" type="checkbox"/>	you need a flexible investment term;
<input checked="" type="checkbox"/>	you want to grow your wealth; and
<input checked="" type="checkbox"/>	you want the flexibility to access your funds when you need it.

Your investment

Investment term	The investment doesn't have a minimum or maximum investment term.
Investment components	You can choose from a number of unit trusts that offer you access to local and offshore markets, depending on your investment objectives. These include unit trusts managed by reputable investment firms in both Namibia and South Africa. Your growth and risk is linked to your choice of investment components.
Contributions	You can make regular or lump sum contributions to your investment.
Minimums	You can invest a N\$50 000 lump sum or a monthly recurring payment of N\$1 000.

Fees

Administration, advice and asset management fees apply. For more information on these fees, refer to our fee schedule or speak to your financial adviser.

Tax

We will follow the relevant rules and deduct tax where applicable.

What happens when I die?

The investment will form part of your estate. You cannot nominate beneficiaries for this investment.

Can I make changes to my investment?

You can change your investment as your needs change. These changes include contributions to your investment, making withdrawals and switching between underlying investment components.

When can I access my investment?

You can withdraw from your investment at any point during your investment term. You can also choose regular withdrawals. However, withdrawals should be made in line with your investment objectives, while considering your investment risk.

More information

Contact your financial adviser if you have any questions or need more information or visit momentum.com.na

You can also call us on (+264) 61 297 3737 or send an email to wealthservice@momentum.com.na.

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