



RiseUp Capital

Invest. Empower. Succeed.

TAX-FREE SAVINGS ACCOUNT



Make the Most of Your Tax-Free Savings with RiseUp Capital.

Take advantage of RiseUp Capital's Tax-Free Savings Account to fully benefit from your tax-free savings allocation. Maximize the tax breaks available to you and grow your savings more efficiently.

Start Saving Smarter Today!

How Can a Tax-Free Savings Account Benefit Your Investment Portfolio?

Tax-Free Savings Accounts (TFSAs) were designed to help South Africans save more effectively while enjoying higher returns, particularly with long-term commitments. They offer a unique set of benefits that can complement your overall investment strategy:

- **Tax-Free Growth:** Any growth earned on your TFSA investment is exempt from tax, including interest, dividends, and capital gains. Enjoy competitive, market-beating returns while fully utilising the tax benefits of your TFSA
- **Maximise** your returns, especially with long-term investment commitments.
- **Flexible Contributions:** Invest up to R36,000 per financial year, with a lifetime limit of R500,000. You can choose between lump-sum investments or monthly contributions to suit your financial needs.
- **No Fees or Market Volatility Concerns:** RiseUp Capital's TFSA offers market-beating returns with no monthly fees, shielding your investment from volatile equity markets.

Estate-Planning Benefits:

- Your investment can be paid to beneficiaries immediately, ensuring a smooth transfer of wealth.
- **No executor fees apply**, though the value of the investment will be included in your estate for estate duty calculations.

Expert Investment Management:

Your chosen unit trust investments will be managed according to our proven investment philosophy, ensuring optimal growth.



- Build your long-term wealth by investing monthly or starting with a lump sum, subject to our minimums and the prescribed maximum limits.

Seamless Transfers

- Already invested in another TFSA? Transferring to RiseUp Capital is a straightforward and hassle-free process.

Investment limits

- You can contribute to our Tax-Free Investment via debit order or you can transfer your tax-free investment from another financial services provider.

Minimum and Maximum investment amount

- R36 000 minimum - R1 000 minimum per month
- R1000 minimum per additional investment - R3 000 maximum per month
- R36 000 maximum per year, subject to a lifetime maximum of R500 000

Take full advantage of the tax breaks and grow your wealth confidently with RiseUp Capital's Tax-Free Savings Account.



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