momentum
wealth international

Empowering South African clients to invest globally with confidence

Singular personalisation
on your journey to success

Momentum Wealth International helps clients build and protect their financial dreams on their journey to success, whether immediate or over the longer term.

Each person's investing journey to success is unique and personal. With us, you can shape that journey in the most singular way.

Why **invest offshore?**

In today's interconnected world, diversifying beyond South Africa's borders is no longer a luxury; it's a strategic necessity.

Offshore investing helps clients:

- build and protect their wealth;
- hedge against country-specific risks; and
- access opportunities that are not available regionally.

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By offering clients access to global economies, hard currencies, and new sectors, offshore investing becomes a critical tool for long-term growth, wealth creation and risk management.

1 Expanding opportunities through diversification

Offshore investing opens the door to diverse global markets, economies, and currencies. By allocating capital internationally, clients **reduce country-specific risk** and gain access to a broader opportunity set across sectors and geographies.

2 Preparing for future offshore expenses

Whether planning to educate children abroad, buy property, emigrate, or retire internationally, offshore investments can help clients ensure their wealth is aligned with **future currency and location needs**.

3 Rand hedging and risk management

Investing offshore helps **protect** against rand depreciation, inflation, and interest rate volatility. Clients gain stability through hard currency exposure.

4 Mitigating political and economic risk

Offshore allocations offer a **safeguard** against South Africa's political and economic fluctuations, providing peace of mind through global diversification.

5 Access to growth sectors and leading companies

Global markets provide **access to dynamic sectors** like technology, healthcare, clean energy, and high-growth companies not listed in South Africa.

6 Location of investment matters

Where an investment is domiciled affects its protection, accessibility, and tax treatment. An ideal offshore jurisdiction offers a **stable and reputable** financial environment, strong legal and regulatory systems, tax efficiency, high compliance standards, and world-class infrastructure.

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Why **Guernsey?**

Guernsey is a globally respected international finance centre with deep expertise, stability, and robust investor protection. It offers the ideal jurisdiction for clients looking for regulatory certainty, tax neutrality, and ease of doing business, making it a highly attractive choice for South African clients with global aspirations.

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1

Political stability and regulatory strength

Guernsey has a long-standing democratic government and is not directly exposed to the geopolitical tensions affecting many other jurisdictions. As a self-governing Crown Dependency with political and economic stability, it is a safe and reliable place to do business. Investments are overseen by the Guernsey Financial Services Commission, a regulator known for its strong yet adaptable and practical approach.

2

Economic strength and financial expertise

Guernsey's financial services sector contributes over 37% to the island's GDP. Home to major banks and investment firms, it is built for financial efficiency and operational excellence.

3

Legal protection

Clients benefit from a well-established legal and regulatory framework with reliable mechanisms in the event of dispute resolution and legal recourse.

4

Tax efficiency

Guernsey offers an attractive tax regime to investors. There is no capital gains tax, and no income tax is applied to assets held by non-Guernsey tax residents.

5

Ease of doing business

Guernsey's infrastructure, skilled workforce, and well-developed financial systems make establishing, managing, and repatriating offshore investments easy.

6

No exchange controls

Guernsey allows the free flow of capital, with no restrictions on money movement, making exits and money transfers simple.

7

Reputation and transparency

As a globally acknowledged financial hub, Guernsey maintains international credibility, strong governance, and investor trust.

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Momentum Wealth International is part of **Momentum Group Limited**, a JSE-listed financial services group with over a century of experience in financial services. Backed by institutional scale, a proven reputation, and multi-disciplinary capabilities, advisers and clients can invest with confidence knowing their offshore journey is supported by one of South Africa's most trusted and enduring financial partners.

Strength and scale

Momentum Group offers institutional backing, credibility, and resources across investment management, insurance, and integrated financial services and is dedicated to **building and protecting clients' financial dreams.**

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Why **Momentum Wealth International?**

Momentum Wealth International offers a **seamless and secure** offshore investment platform. With over 25 years of expertise and cutting-edge technology, it empowers clients to achieve their financial goals globally through trusted long-term partnerships with financial advisers.

With assets under administration exceeding USD4 billion and more than 10 000 clients, we are well-equipped to support South African advisers in delivering **customised global solutions** for each client's offshore investment needs.

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Differentiated by design

- Established in **1999**.
- Assets under administration exceed USD4 billion and more than 10 000 clients globally.
- Proven track record across market cycles.
- Product structures tailored for tax efficiency, succession planning, and wealth preservation.
- Full transparency and clear client reporting.

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Leading technology and tools

- Online platform with 24/7 access.
- Practical information and planning resources.
- Secure digital servicing.
- Multi-currency contracts with consolidated reporting in preferred currency.
- Calculators and tools for efficient investment planning, including portfolio construction.

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Leading technology and tools

- Tools, performance analytics, IRR calculators, and CGT calculators.
- Adviser-centric operational features such as report extraction at both individual and bulk levels.
- Bulk statement delivery to multiple clients via a single tool.
- Automated scheduling of regular client reports.
- Integration capabilities to link Momentum Wealth International platform data with advisers' financial planning software.

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Future-fit innovation

- Evolving towards a fully digital experience.
- Continuous innovation in product development aligned to future needs.

Global accessibility

- One investment platform that is accessible globally in hard currency.
- Ideal for clients and families living across jurisdictions.

Comprehensive adviser support

- Offshore specialists.
- On-the-ground support in South Africa.
- Technical support.
- Tools and calculators to support the advice process.
- Dedicated service centre.

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Product **overview**

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Momentum Wealth International offers **two distinct investment options** to meet the offshore investing needs of a wide variety of South African clients. These solutions provide **flexibility and choice**, making it easier for advisers to align product features with their clients' personal goals and circumstances, tax profiles, and future plans, whether they are considering tax efficiency, succession planning, or long-term global exposure.

1

Global Wealth Endowment

A structured five-year endowment that offers a **tax-efficient** way to invest. This option is ideal for South African tax residents seeking pure offshore exposure while benefiting from comprehensive succession planning opportunities. The Global Wealth Endowment is well-suited for high-net-worth individuals focused on **intergenerational wealth transfer**, liquidity (via multiple underlying policies), and **estate planning efficiency**. It also simplifies administration because Momentum Wealth International manages and pays tax on the client's behalf according to the 'five-funds approach', a tax approach that life insurance companies in South Africa are required to follow.

GWE product brochure

2

Global Wealth Investment

A flexible, open-ended investment structure ideal for clients who require **liquidity and simplicity**, who want to manage their own tax affairs or live in tax neutral jurisdictions. The Global Wealth Investment is particularly well-suited for clients who have emigrated or are considering emigration. The tax is not handled within the product but rather in the client's hands, according to their local tax jurisdiction. This means clients can **live and move globally** without the need to potentially restructure their investment, making the Global Wealth Investment a powerful solution for **portability, control, and transparency.**

GWI product brochure

GWE and GWI comparison

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Safety and **security**

Momentum Wealth International is based in **Guernsey**, a premier offshore jurisdiction recognised for its strong regulatory standards and consistently high ratings under global anti-money laundering frameworks, such as those of the **Financial Action Task Force and MONEYVAL**.

When it comes to offshore investing, clients want certainty that their money is well-protected, especially South African clients who are increasingly concerned about political and economic risk.

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Momentum Wealth International addresses these concerns through solid product design, global jurisdictional safeguards, and a legal framework **prioritising investor protection**. As a Guernsey-based provider, Momentum Wealth International benefits from operating within one of the world's most reputable and rigorously regulated offshore financial centres.

As a Guernsey registered firm, Momentum Wealth International offers clients the reassurance of operating under a **stable and internationally respected regulatory regime**. Governed by Guernsey law and regulated by the Guernsey Financial Services Commission, Momentum Wealth International adheres to global standards such as those set by the Financial Action Task Force. This provides a level of certainty and regulatory oversight that distinguishes Guernsey from many other offshore jurisdictions, including local structures in South Africa.

In addition, the **endowment** product available through the Momentum Wealth International platform includes an **independent trustee** as required by Guernsey law, serving as a built-in safeguard for clients. For added reassurance, assets are held within a Guernsey-based nominee structure rather than a South African one, providing an additional layer of protection. This multilayered protection, combined with the oversight of a JSE-listed group and Moody's endorsement of our financial strength, provides unmatched security for clients seeking stability outside South Africa.

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Investment **choice and flexibility**

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Momentum Wealth International offers a sophisticated investment framework for advisers to **build customised portfolios** that align with their clients' unique investment goals, time horizons, and risk profiles. The platform provides access to a combination of global actively managed investment funds (unit trusts), cost-efficient ETFs, discretionary model portfolios, and fully tailored international personal share portfolios.

These components empower advisers to create **globally diversified investment strategies** across asset classes, geographies, currencies, and mandates, all managed on a single, streamlined investment platform.

Investment funds

The platform provides access to a wide range of clean-priced global funds spanning multiple sectors and regions, managed by reputable investment managers. These solutions are carefully selected to meet diverse risk profiles and long-term investment goals.

Investors can also benefit from access to **Curate Investments**, our global investment manager partner. Each Curate fund is managed by a world-class investment team, handpicked for their proven ability to deliver over time, whether you're seeking deep value, innovation, long-term resilience or low-cost passive alternatives. Curate's fund range gives investors access to the best ideas from top investment managers all over the world, whatever their investment goals.

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Exchange-traded funds

Momentum Wealth International provides access to a comprehensive range of passive and index-tracking ETFs. These solutions have gained traction among cost-conscious investors seeking targeted exposure to specific regions, industries, or investment styles. ETFs enhance portfolio transparency and liquidity while reducing costs, enabling the efficient construction of globally diversified portfolios tailored to long-term goals.

Model portfolios

The platform enables multiple discretionary fund managers (DFMs) to manage model portfolios directly in the Momentum Wealth International ecosystem. These model portfolios cover a variety of investment outcomes, asset class mixes, and currencies, offering scalability, consistency, and ease of administration.

Equilibrium, our discretionary fund manager partner, delivers outcome-based, multi-asset portfolios that are dynamically managed to meet the evolving needs of South African investors. Their solutions combine disciplined risk management with global insight, ensuring portfolios remain aligned to client objectives across market cycles.

Click here for more

International personal share portfolios

Momentum Wealth International supports international personal share portfolios for clients requiring bespoke investment solutions. It allows direct investment in global listed securities. Advisers can work with a network of trusted investment managers and stockbrokers, including Momentum Securities, our in-house stockbroking and wealth management business.

Momentum Securities offers tailored portfolio solutions including direct equity, fiduciary deposits, structured notes and discretionary mandates supported by robust research and execution capabilities. International personal share portfolios offer maximum flexibility and customisation, making them ideal for clients with complex needs related to currency, tax, liquidity, and specific ethical or sector preferences.

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Succession planning **and wealth preservation**

For many clients, building and protecting wealth is not just about their lifetime; it's about creating a **lasting legacy**. Momentum Wealth International, together with financial advisers, helps clients to plan confidently for the future by providing flexible, globally accessible investment solutions that support legacy planning and intergenerational wealth transfer.

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Our solutions offer a **comprehensive suite of succession planning features** to facilitate the smooth, effective, and cost-efficient transfer of ownership or proceeds to beneficiaries. By structuring investments appropriately, clients can avoid unnecessary delays, simplify estate administration, and significantly reduce costs such as executor fees, capital gains tax (CGT), and estate duty.

These features are particularly valuable in **multi-generational and cross-border family scenarios** where continuity, clarity, and tax efficiency are key priorities. Whether the client's objective is to provide for their spouse, children, or a broader network of heirs, Momentum Wealth International enables advisers to design investment strategies that align with clients' long-term legacy goals.

Key succession planning options include the following:

1

Joint ownership with survivorship ensures uninterrupted ownership because the investment passes to the surviving spouse for the Global Wealth Endowment and to the surviving co-owners for the Global Wealth Investment.

2

Through **contract successor arrangements** on the Global Wealth Endowment, nominated individuals or entities can seamlessly assume ownership without liquidating the investment.

3

Beneficiary and alternate beneficiary nominations enable direct payment of investment proceeds from the Global Wealth Endowment to chosen individuals or entities, helping to bypass probate in many cases and expediting access to capital.

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Global Wealth Investment

Owner(s)

Joint and survivorship provision

Global Wealth Endowment
Capital Redemption Bond*

Owner(s)

Joint and survivorship provision

A successor contract owner(s)
(and alternate successors)

Global Wealth Endowment
Life Insurance Bond

Owner(s)

Insured life or lives

Joint and survivorship provision

A successor contract owner(s)

Beneficiaries of death proceeds
(and alternate beneficiaries)

*Sinking fund

Through the effective use of these features, advisers can help clients preserve wealth, eliminate unnecessary costs, and ensure their financial wishes are fulfilled without placing undue burden on their loved ones. Momentum Wealth International's solutions are compelling when integrated into broader estate planning and tax strategies, enabling advisers to offer **peace of mind and meaningful outcomes** for their clients and their heirs.

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Making offshore **investing simple**

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Offshore investing can seem complex, but with Momentum Wealth International, it doesn't have to be. We provide **intuitive tools, expert support, and streamlined processes** so advisers can focus on advice and client outcomes, not administration.

1

Easy-to-understand information and planning resources.

2

Exchange control **support**.

3

Integrated support from our teams in South Africa and abroad.

4

Clear onboarding and service support for clients and advisers.

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Dedicated support from Momentum consultants and the Momentum Wealth International specialists

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Offshore investing involves complex considerations, from tax and succession planning to legal structures and portfolio design. That is why we have a **dedicated team** of Momentum Wealth International specialists to support our distribution channels and financial advisers.

Our specialists provide
expert support across a wide range of areas, including:

- Momentum Wealth International product structures and positioning
- Tax implications for South African and global clients
- Exchange control processes and offshore allowance planning
- Succession planning and intergenerational wealth transfer
- High-level legal and fiduciary considerations
- Portfolio structuring using investment funds, model portfolios, exchange-traded funds, and international personal share portfolios

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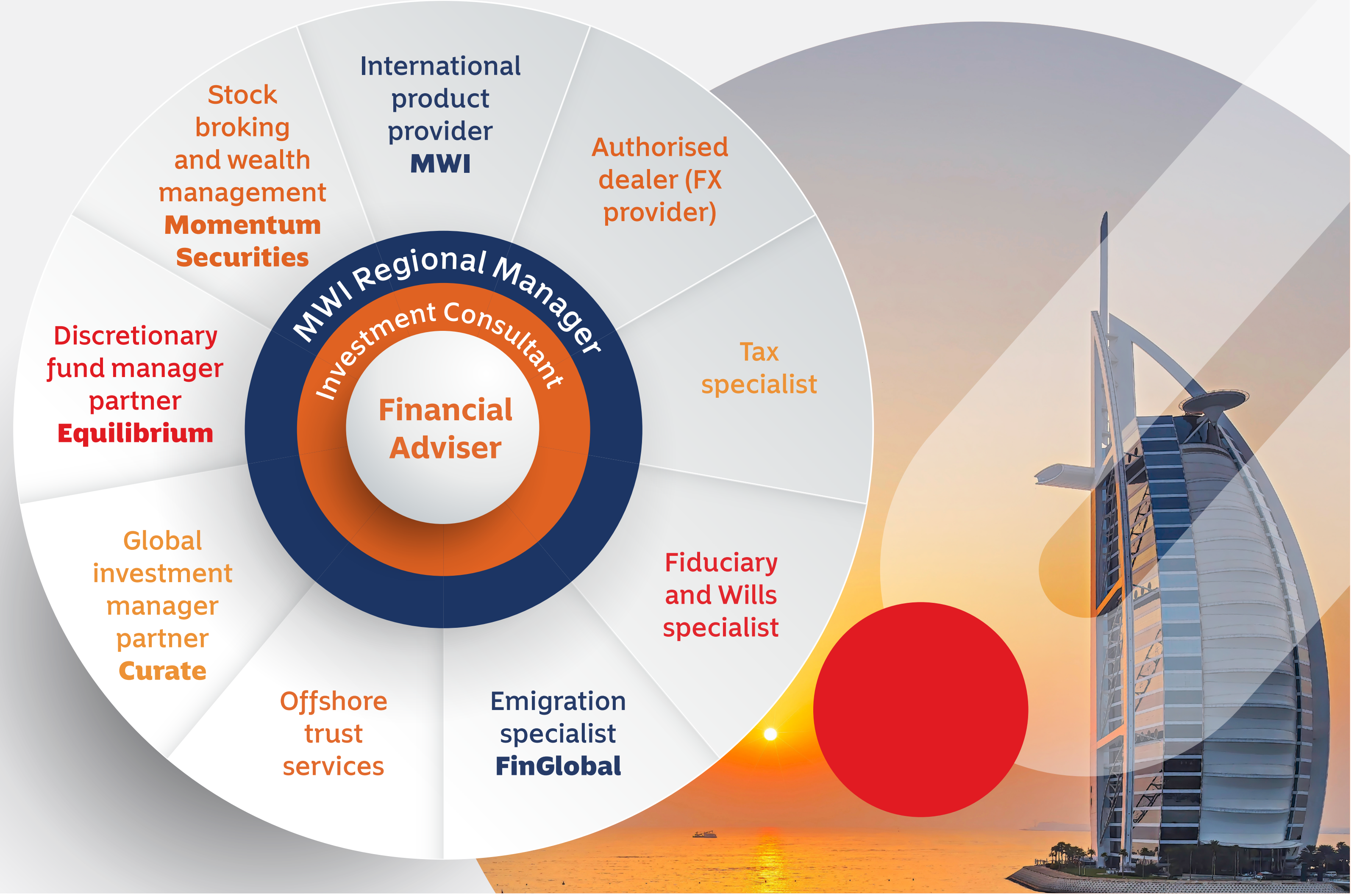
Whether you advise a new client, build a portfolio strategy, or navigate complex offshore estate scenarios, our specialists are here to help. When necessary, we refer queries to a network of legal, tax, fiduciary, and investment experts to ensure every adviser has the support they need.

Advisers are never alone; we are here to support you with practical, expert, and personalised guidance that builds client trust and confidence, and enables you to deliver meaningful investment outcomes for your clients.



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Transparent **fees**

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Our pricing philosophy is built on **transparency and fairness**. With no hidden charges and a familiar experience that mirrors our South African investment solutions, advisers can confidently communicate costs without confusion.

1. **Competitively priced** model portfolios are available for the Global Wealth Endowment and the Global Wealth Investment.

2. **Clean-priced investment** funds and exchange-traded funds ensure transparency of underlying costs.

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Momentum Wealth International's solutions **cater to a diverse range of clients**, making it easier for advisers to support and guide clients at various stages of life or within any structure.

Individuals (residents in South Africa and abroad)

South African and offshore trusts

Corporates with offshore investment objectives

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Momentum Wealth International **streamlines the offshore investing journey**, supporting advisers and clients through the investment process.

R1 million discretionary allowance available without tax clearance.

R10 million foreign investment allowance available with SARS clearance.

Forex services via authorised dealers for cost-efficient conversions.

Exchange control support is built into our digital process.

Our products are only available through licensed financial advisers because investment decisions are important, and clients should not make them without expert financial advice.

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Partner with Momentum Wealth International. **Empower your clients.**

Let Momentum Wealth International be your trusted partner in guiding South African clients to invest globally on their journey to success: **safely, simply, and strategically**.

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