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COLLAGE PORTFOLIO

The Art of Financial Planning

Creating Wealth

Investment Plan

Share portfolios

Collective Investments

Local & Global



Wealth : Investment Plan

Collage Portfolio's dynamic investment platform caters for all of your investment goals, no matter how you want to build your investment portfolio. Within a single investment contract, thus saving you on policy fees, you have access to any number of investment funds from a variety of investment institutions. You can set up your personal investment with any building blocks you choose: Shares or Collective Investments (Unit Trusts) or Bonds or Property, Local or Global and even a combination of these. As Investment Managers, we'll determine your Investment Personality and help you compile your unique portfolio in line with your investment goals.

Who Everyone who earns an income would do well to set aside at least 10% of their net earnings. Most people think of the future and therefore have financial needs such as children's education, growing capital for a rainy day, holidays, houses, furniture, cars, retirement ...

What A Collage Investment Plan is your gateway to a tailor-made investment for you within a single investment plan. You can build your investment with a lump sum, a monthly investment or both. You can draw an income monthly from your capital or you can leave it to grow. You have access to your capital whenever it suits you. Your investment can be made up from shares or any collective investments (unit trusts) and it can be local or offshore or any combination. Whatever you need, Collage can provide.

Why People invest for different reasons. Some have a lump sum to invest to earn interest to provide an income. Others may be saving monthly to build up capital to use at a later time for any number of reasons. Others may be investing for their retirement. The most compelling reason to invest with Collage is to earn more growth on your funds than you would if you invested in a general account.

When If you have capital of R100,000 or more and/or R1,000 or more per month to save, you should contact Collage to set up an investment account.

Where Contact us by phone, fax, e-mail or by scheduling a free consultation. Our contact details are listed at the top of this brochure.

How Schedule a consultation with Collage Portfolio in person or online via our website. We will discuss your circumstances and your investment goals. Collage will determine your Investment Personality and help you with your Budget. You may check your Budget and your Investment Personality yourself via the programs on our website, if you prefer. Once we have agreed on your needs, we will offer you a tailor-made Investment Plan. We then complete the necessary forms and your funds are invested. You receive a policy document for your records and safe-keeping. As financial planners and investment advisors, we will monitor your investment(s) and keep you updated with regular communiquéé. We will recommend adjustments to your portfolio when opportunities arise. Collage will provide you with a username and password so that you may monitor your portfolio online, anytime.

More Info An Investment Plan with Collage Portfolio will ensure you get the most value from your capital/monthly investment. We have the range of products to meet your goals. The products are flexible to meet your every need and are adaptable to market changes. We are your investment partner to make sure your portfolio is always doing what it should and out-performing!