



INVESTMENTS

PPS INVESTMENTS

BENEFITS OF LINKING

Success is better, **shared.**

Maximising your PPS Profit-Share Account by Linking your family's investments

As a qualifying PPS member, you share in the profits of the PPS Group that operates under the ethos of mutuality.

When investing with PPS, you can increase your Profit-Share allocation through Linking and the Profit-Share Cross-Holdings Booster.

Why consider Linking?

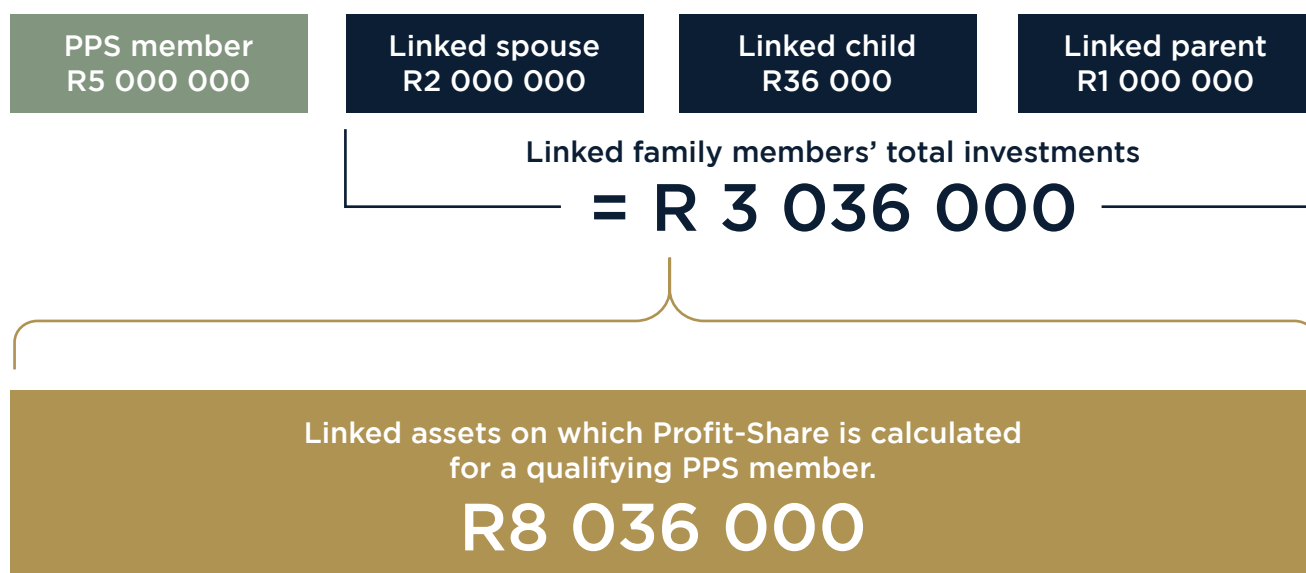
The answer is simple: your Profit-Share will be calculated on the combined asset size and investments in PPS funds.

Linking family members for extra Profit-Share from PPS Investments

You can link the following family members' investments to your PPS member number to earn additional Profit-Share:

- Spouse or life partner;
- Children of all ages;
- Parents and parents-in-law ; and
- Companies and Trusts that hold
- Family assets*

Only the amount invested on the PPS Investments Platform and held within any of the PPS Investments unit trusts qualify for Profit-Share.



Note that the additional profit allocation from Linking is specific to PPS Investments, and does not include allocations from holding PPS Group products. Linked investments may also include those held through Companies and Trusts, allowing you to further enhance your potential Profit-Share. *Companies and Trusts must meet PPS Investments' Linking requirements

Who qualifies for Linking?

PPS members:

- with an active PPS Profit-Share Account™ or Vested PPS Profit-Share Account; and
- holding investment products with PPS Investments.

How to apply for Linking?

You can access the application form on the PPS Investments website at

<https://www.pps.co.za/invest/forms-and-documents>

**Find out how to
maximise the benefit
of family investing
by clicking here.**

Family investing to access reduced administration fees

Did you know that you can also get access to reduced administration fees by connecting your family's investments, including those held through Companies and Trusts, through the PPS Investments Family Network?

Visit www.pps.co.za/familynetwork for more information.

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About PPS Investments

We are part of PPS, a holistic financial services company specialising in bespoke financial solutions exclusively for graduate professionals.

At PPS Investments, we offer a suite of flexible investment solutions for pre-retirement, post-retirement and wealth creation. We create opportunities for optimal diversification through our fund range that caters to various risk appetites and time horizons. Our offering is geared to meet the investment needs of PPS members, their families and other discerning investors.

Get in touch

To learn more about Linking, please consult your PPS Investments accredited financial adviser.

Alternatively, feel free to contact us on 0860 468 777 (0860 INV PPS) or at clientservices@ppsinvestments.co.za.

www.pps.co.za/invest





An investor is considered to have an active investment, for the purposes of Linking, when their total assets under management on the PPS Investments platform exceeds R2 000 at the end of all months in the relevant year or they have an active debit order as of 31 December that year.

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Please note: Companies and Trusts must meet PPS Investments' Linking criteria to qualify.

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