

January 2021

Dear Adviser

Retirement Annuity and Tax Free Investment Plan cut-off times for the current tax year

Please take note of the cut-off times for PSG Wealth Retirement Annuity and Tax Free Investment Plan investments that need to be met to ensure these instructions are processed for inclusion in the current tax year, ending 28 February 2021.

Date*	Details
Wednesday, 24 February 2021	Cut-off date for receipt of complete application and additional contribution forms. Instructions must be complete, received and without any outstanding requirements, including proof of deposit. Funds must also reflect in our bank account. This means that EFT payments must be made 48 hours before.
Friday, 26 February 2021	Cut-off date for direct debit instructions (collections). The maximum amount allowed for a direct debit is R1 million.
Wednesday, 24 February 2021	Final date for funds to reflect in our bank account.

*Our cut-off times are 08h30 for money market and life funds and 10h30 for other unit trusts.

Missing the cut-off dates means that instructions will only be processed for inclusion in the following tax year which starts on 1 March 2022.

Need more information?

If you have any queries, please contact your investment specialist or your dedicated client service team.

Kind regards



Cindy Tshabalala
Head of Client Service