

Adviser Notice 86

February 2023

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 contributions to PSG Wealth Retirement Annuity Fund 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 2023. Missing these cut-off dates means that instructions will only be processed for inclusion in the following tax year.

Payment method	Cut-off dates
Electronic collections*	Instructions must be received by Friday, 24 February 2023.
Electronic fund transfers	Funds need to reflect by Tuesday, 28 February 2023. We recommend making payments 48 – 72 hours prior to this.

* Note that the tax date applicable to recurring electronic collections will be the intended electronic collection date, regardless of whether the intended collection date is a business day or not.

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