



Wealth Product Brochure



WEALTH



An easy to use summary of our Wealth products.
For more information please [visit our website](#).

Wealth Plan



Delivering **excellent returns**

The Clientèle Wealth Plan offers you top class investment by professional fund managers to deliver excellent returns over a 20-year period.



Products Benefits

In the event of your death, your beneficiary/ies will be paid the full value of your investment account without any deductions.

Long-term savings will help you take care of the future by helping you grow your savings. You can use this savings for education, your dream car, new home, lobola or luxuries like an overseas holiday.

Should you want to 'surrender' your policy (withdraw some or all of the funds saved) you will sacrifice the benefit of long-term savings and pay a surrender charge. While this will never be more than 15% of the investment account plus the administration charge, it is something to keep in mind.

● It pays to **save** with **Clientèle**.



Please visit our [website](#) for more details

Wealth Plan:
sms **WEALTH to 45487



Clientèle

Clientèle Office Park, Corner Rivonia & Alon Roads, Morningside, 2196

Monday to Friday: 08h00 – 17h00 • Saturday: 08h00 – 12h00

Tel: 011 320 3000

Fax: 011 320 3133

Email: services@clientele.co.za

Website: www.clientele.co.za

Mobisite: www.clientele.mobi

Wealth Plan: sms **WEALTH** to **45487** (sms free of charge)

Disclaimers

**By sending a SMS, you consent to Clientèle processing and retaining your personal information in line with our Privacy Policy which is available on www.clientele.co.za.

Long-term insurance policies are underwritten and administered by Clientèle Life Assurance Company Limited, an authorised financial services provider and licensed insurer: FSP 15268. Premiums escalate by 10% and benefits escalate by 6% annually.

Short-term insurance policies are underwritten and administered by Clientèle General Insurance Limited, an authorised financial services provider and licensed insurer: FSP 34655. This is a monthly renewable policy with premiums and benefits escalating by 10% annually.

The Rewards programmes are provided by CBC Rewards (Pty) Ltd, which provides non-insurance services and products relating to lifestyle and loyalty benefits. The Rewards programmes are offered either as stand-alone products, or as optional loyalty benefits to policyholders in conjunction with insurance policies offered by either Clientèle Life Assurance Company Limited, or Clientèle General Insurance Limited.

For policy or The Rewards programme terms and conditions visit www.clientele.co.za or contact us on 011 320 3000.

Third parties are remunerated for their services to the brand. This brochure and its contents do not constitute financial advice. Terms and conditions apply.