

BRENTHURST NEWS FLASH

JHB: +27 (0)11 799 8100 | PTA: +27 (0)12 347 8240 | CPT: +27 (0)21 418 1236 | BELLVILLE: +27 (0)21 914 9646

INVESTMENT PLANNING • RETIREMENT PLANNING • OFFSHORE INVESTMENTS
TAX PLANNING • ESTATE PLANNING • LIFE INSURANCE



THE POWER OF INDEPENDENT ADVICE

5 FEBRUARY 2015

TOP UP RA'S THIS MONTH

As the end of the 2015 tax year approaches, do consider transferring money into existing retirement annuities as soon as possible. **RA investments offer great tax benefits and, of course, remain a popular and trusted instrument for saving for retirement.**

"Although there are limits to the totals that can be deducted for tax benefits many investors contribute well below the limits annually and therefore miss out on the advantage it offers," says Gavin Butchart, Brenthurst Wealth tax expert.

"Such additional contributions can be made up to and including the last day of the month, but for ease of administration we recommend it be finalized before the 15th of February," Butchart added.

SMART TIP

RETIREMENT ANNUITIES do not form part of your estate and by investing money into such an instrument you are building assets outside your estate which can be passed on to your heirs without going through your estate. Your investment in an RA also attracts no income tax or capital gains while your money remains invested. **At retirement, which can be any time after the age of 55, you can elect to withdraw one-third in cash while the balance needs to be invested in order to provide you with a lifelong income.**

REMINDER

KIMBERLEY INVESTMENT SEMINAR, 9 FEB 2015

Brenthurst is hosting an investment seminar in Kimberley on Monday 9 February 2015. Should you be interested to attend this seminar, please contact Erna on +27 11 799 8100. **Magnus Heystek, director and investment strategist at Brenthurst Wealth and Dr Alex Pestana, portfolio manager at Counterpoint Asset Management will discuss the current economic climate and elaborate on investment opportunities against that background.**

TIME: 16h00 to 17h45
VENUE: Kimberley Club, 1882 Du Toitspan Rd, Kimberley
TOPIC: Challenges & Opportunities (Creating Global Wealth)
RSVP: JHB +27 11 799 8100 erna@brenthurstwealth.co.za

CONTACT US

UPCOMING SEMINARS

BWM NEWSLETTERS

JOHANNESBURG

Tel: +27 (0)11 799 8100
Fax: +27 (0)11 799 8101

Unit 2B, Cedar Office Estate,
Cedar Road, Fourways, SA

PO Box 10150, Fourways East,
2055, Gauteng, SA

PRETORIA

Tel: +27 (0)12 347 8240
Fax: +27 (0)12 347 0601

494A Lois Avenue, Erasmuskloof
X3, Pretoria, SA

PO Box 32593, Waverley,
Pretoria, 0135, SA

CAPE TOWN (DE WATERKANT)

Tel: +27 (0) 21 418 1236
Fax: +27 (0) 21 418 1304

29 Chiappini Street, De Waterkant,
Cape Town, 8001, SA

Postnet Suite 275, Box X22,
Tygervalley, 7536, Cape town, SA

BELLVILLE (TYGERVALLEY)

Tel: +27 (0)21 914 9646
Fax: +27 (0)21 914 6515

Tyger Waterfront, Block 2, Waterfront
Road, Carl Cronje Drive, Bellville, SA

Postnet Suite 275 P/Bag X22,
Tygervalley, 7536, Cape town, SA



Follow us on Facebook



Follow us on Twitter



STONEHOUSE
CAPITAL
Partnering the Exceptional