



▶ Financial Planning

We connect you to more.

Our globally integrated advice will connect your current financial reality to the future you want.

see money differently

Nedbank Ltd Reg. No 1951/000009/06. Licensed financial services and registered credit provider (NCRCP16). T's & C's apply.

NEDBANK

Connected wealth lies at the heart of all we do.

Your money decisions reflect, reveal and enable what is important to you. Your goals and needs, dreams and fears, attitudes, and the role you play in your community are all inherently connected to how you earn, save and spend.

This is what we call 'connected wealth' – the fact that each financial decision is connected through invisible threads to other aspects of your life.

Our globally integrated advice makes these threads more visible and therefore more manageable. It also connects you to the solutions, services and expertise you need to make the most of your money and achieve your definition of success.



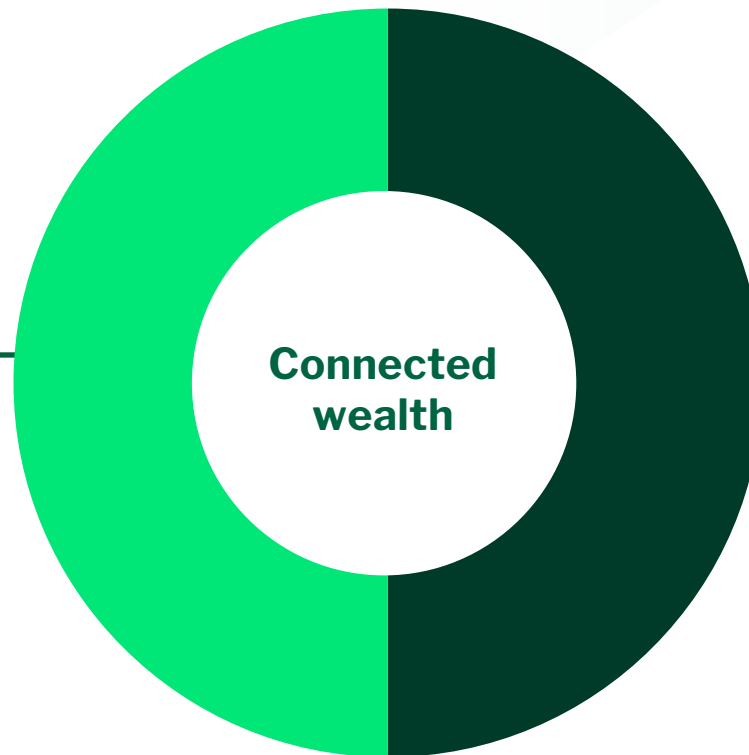
Your priorities are the foundation of our globally integrated and advice-led approach.

Whether you are making money decisions to achieve a personal goal, taking care of your family, uplifting your community or growing your business, we will connect you to more.



For individuals

Connect to more for yourself, your family and your community.



For business

Connect to more for your business and your employees.

What is important to you?

The first step in our advisory approach is to focus on understanding what is important to you and what success means for you, because everyone's circumstances, priorities and goals are different.



Bank and borrow optimally

Have easy access to your money wherever you are, with 24/7 support.

Keep track of and manage your money locally and internationally.

Get advice and services to meet your borrowing needs.



Protect your wealth

Have peace of mind that your loved ones and your business will be taken care of if something happens to you.

Limit the financial impact of damage to or theft or loss of your belongings and other assets.



Grow your wealth

Find the most appropriate investment for your needs.

Manage your risk.

Generate an income from your savings.

Have access to the best opportunities locally and internationally.



Structure and transfer your wealth

Minimise the impact of costs and taxes on your wealth.

Have peace of mind that your family will benefit from your wealth.

Be confident that your wealth is structured optimally according to the latest local and international laws and regulations.



Use your money to have a lasting positive impact

Use your resources wisely to best serve the communities and causes you care about.

Ensure your non-profit can deliver services in tough times by investing for long-term sustainability.

How connected wealth meets those needs.

We will ask you about your current money habits: how you currently spend (and are rewarded for this), borrow, save, bank, invest, protect what is important to you, or give to any cause that you care about. In discussion with you, we will then agree on a plan to ensure that your financial decisions connect your current reality to the future you want.



Bank and borrow optimally

Local and international banking

- Credit cards
- Current accounts
- Home loans
- Structured lending
- Asset-based finance
- Foreign exchange



Protect your wealth

Short-term insurance and life assurance

- Personal and business insurance
- Life assurance
- Health cover



Grow your wealth

Local and international investments

- Savings products, a range of unit trusts managed by Nedbank Private Wealth and other managers, and bespoke structured products
- Retirement savings products
- Short-term and long-term investment options
- Stockbroking services and solutions



Structure and transfer your wealth

Local and international fiduciary services

- Wills drafting and safe custody
- Estate planning
- Corporate trustee and trust administration
- Financial accounting and tax compliance
- Estate administration and executorship



Use your money to have a lasting positive impact

Philanthropy

- Give in an efficient and sustainable manner.
- Optimise your corporate social investment spend.
- Provisionally manage and invest the reserves of your non-profit.

Some of the ways we connect you to more.

We will reward you for using your money wisely and help you enjoy the lifestyle you deserve.

Nedbank Greenbacks

Earn rewards as you spend

The Greenbacks programme enables you to earn Greenbacks based on how you manage your money. With Greenbacks you can take control of your money habits and turn them into achievable financial goals.

With our advice you will make better money choices and be rewarded for these in the form of cash back, points, reduced fees and access to exclusive partner deals, coupons, discounts, vouchers and competition entries.

Avo by Nedbank

An all-in-one 'super app' created to facilitate your lifestyle needs

The new Avo super app is everything you need to upgrade your lifestyle.

You can get all your groceries from multiple retailers in one delivery, or browse a variety of e-commerce categories such as tech and home appliances. Avo also offers takeaways, prepaids, professional home services and so much more!



The value of connected wealth.

Our personalised advice will help you make better financial decisions today, so you can achieve the future you want. We will also connect you to the solutions and services you need.



Our global presence.

As you are a Nedbank client, you have access to international opportunities and expertise to diversify your wealth. Your local Nedbank financial planner is supported by an international team of experts to help ensure you make the most of your wealth and international opportunities, regardless of where you or your wealth is located.



Our awards.

Our wealth management awards confirm the world-class quality of our management advisory services and bring you peace of mind, as you know you have chosen to partner with the best.

Wealth Management South Africa

We have been awarded for excellence in philanthropic advice and social-impact investing in South Africa for five consecutive years.



Euromoney
Private Banking
2020 ^{*1}

Wealth Management International

Our achievements have been recognised by a number of international awards.



Sunday Times
100 Best Companies
to Work for 2020 ^{*2}



Colwma winner
2020 ^{*2}



Wealth Briefings
Awards 2019 ^{*2}

*1 Nedbank Private Wealth SA

*2 Nedbank Private Wealth International



Our credentials.

Nedbank is one of the largest financial services groups in Africa, operating in five SADC countries in addition to South Africa.



Why us?

With the support of the financial and institutional strength of Nedbank Group, Nedbank Financial Planning is committed to connecting you to more. Your Nedbank financial planner gives impartial advice but has access to the business scale of Nedbank. The global and local financial strength, governance, specialist insights and institutional depth we offer provides the continuity and certainty that are essential to wealth management.

What sets Nedbank Financial Planning apart:



Our globally integrated advice and expertise



Our 200-year history and heritage



Our award-winning digital services

Keeping you connected

We provide access to our advice and service in the following ways:



Face to face



Via phone or email to our Client Service Centre (CSC) during office hours:
T: 0861 238 8873
E: financialplanning@nedbank.co.za



Chat to us by video at your local Nedbank branch



Via the Nedbank Money app

