

TRANSFER OF TAX-FREE SAVINGS PRODUCTS

National Treasury (NT), in the regulation of Tax-Free Savings Products, provides for the transfer of tax-free savings between investment products of different product providers.

These include products of life insurers, collective investment schemes, banks and RSA retail bonds. The flowchart underneath can assist in the transfer process.

The attached document contains the following:

- Tax-Free Savings Account Transfer Request Form
- The Transfer of Tax-Free Savings Account Certificate, which is issued to the investor for tax purposes.

Tax Free Savings Account Transfer Process

