Philanthropy

Connected Wealth

Access specialist philanthropic advice and services for impactful, sustainable giving.

see money differently

NEDBANK
PRIVATE WEALTH

How connected wealth meets your needs.

The role of our globally integrated wealth management advice is to connect all your financial decisions today to the future you want for yourself and your loved ones. Your advisor can connect you to specialist fiduciary expertise and services to structure and transfer your wealth.

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

- Bank 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

Give sustainably

Philanthropy

- Structure your giving as an individual, family or private foundation
- Optimise your corporate social investment spend
- Provisionally manage and invest the reserves of your non-profit

Connecting you to the causes you care about.

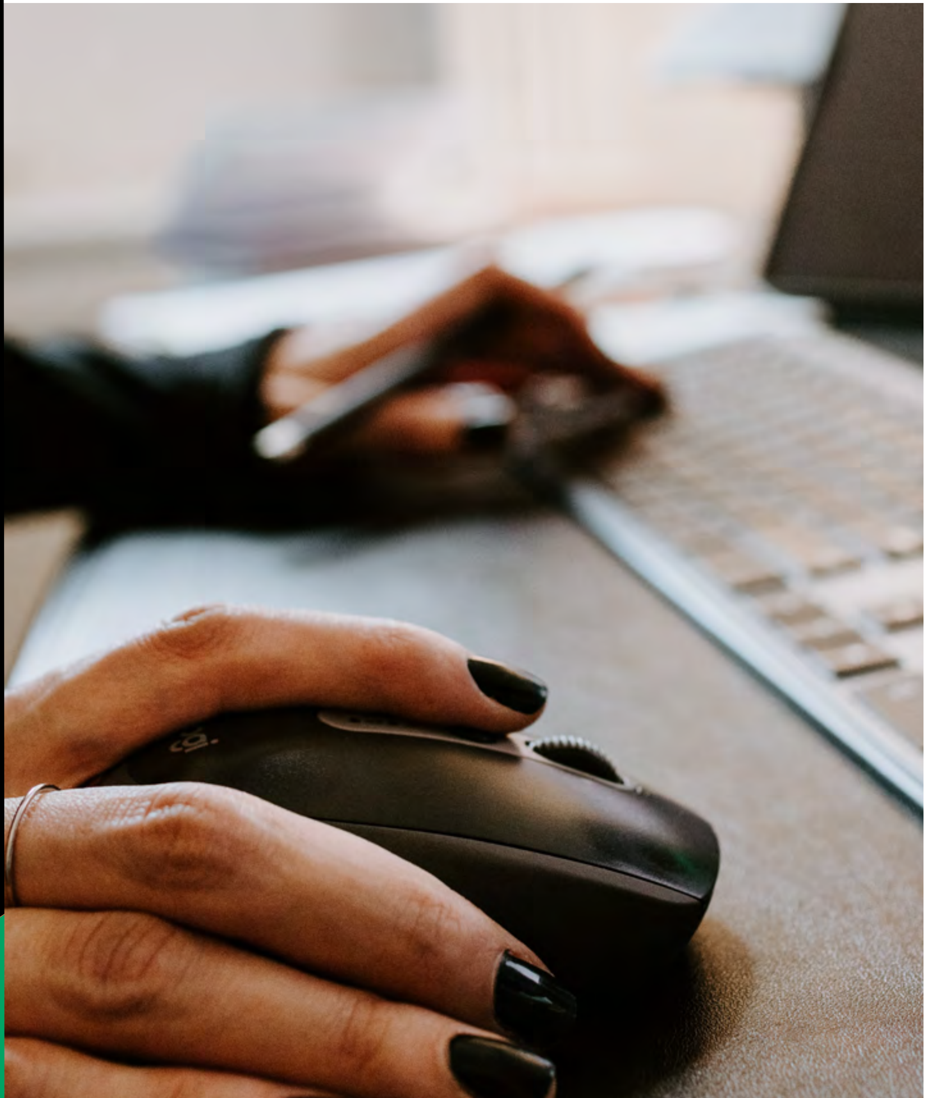
Beyond meeting your personal wealth management needs, you can use your wealth to make a real difference to the world around you and leave a lasting legacy. We are, after all, connected to the communities in which we live and work.

Finding the most effective way of giving your money a life beyond yours requires expert advice and specialised knowledge.

We offer specialist philanthropic expertise and impartial advice to ensure your giving is sustainable and impactful.

What are your personal philanthropic goals?

It doesn't matter how small or large your goals are – if your giving is well structured, it can have a lasting positive impact.



Ask yourself the following:

Do you need to review your business or corporate social investment (CSI) strategy?

Is your personal giving well structured, sustainable and having the impact you want?

If you are a non-profit organisation, are you optimising your finances and are you confident that your organisation is operationally and financially sustainable?

How you give is as important as what you give.

This means you will have:

Peace of mind

That your foundation or non-profit organisation is adhering to all regulatory and compliance requirements.

Confidence

That you will make the most of your giving to make a difference.

Why choose us?

The value of expert advice

You're passionate about making a difference but there are many ways to achieve your giving goals. The question is: which is right for you and how do you go about it?

Our award-winning Philanthropy Office provides expertise, impartial advice and a range of proven services to help you achieve your philanthropy goals in an impactful and financially prudent manner. We will ensure your giving counts in the most effective way possible.

Benefit from the best

We have received awards for excellence in philanthropic advice and social impact investing in South Africa for five consecutive years in the Euromoney Private Banking and Wealth Management Survey.

That means you can be confident that, when you partner with us, you are truly putting your money to work in the most effective way possible.

Making a difference

Just as many of our clients want to use their wealth to have a positive impact in society, so we are equally committed to building a sustainable non-profit sector.

A great example of the initiatives we have undertaken is the 2021 Nedbank Private Wealth Innovation Awards, which rewarded non-profits for demonstrating innovation and resilience during Covid-19.

How we help you give sustainably and with impact.

Be confident that your giving is optimised, impactful and sustainable with our specialist advisory, administrative and investment services and support.

Strategic advice and structuring

Structure your giving as an individual, family or private foundation

- Help with the translation of your ideas and giving goals into reality.
- Set-up and optimal structuring of your charitable foundation.
- Advice on sustainable, responsible and effective giving.

Optimise your business's corporate and social investment spend

- Help with CSI strategy in line with your company's activities and goals, and making the most of the budget you have set for this.
- Help with setting up the best structure through which to conduct your CSI activities.

Optimise your finances as a non-profit organisation

- Access to proven expertise to optimise your operational and financial sustainability.
- Set-up and optimal structuring of an organisation with non-profit objectives.

Investment services

Cash management services

- Invest in high-yielding money market funds or cash management solutions to maximise the money that is available for distribution or required to fund programmes and operational costs.
- Maximise the return on unused grant funding and money not earmarked for reserves.

Tailor-made investment portfolios

- Invest across asset classes as part of a longer-term giving strategy to ensure that a foundation is self-sustaining.

Specialised tax, administration and compliance

Tax-effective giving and the governance and management of foundations

- Advice and tax approvals (for organisations registered as public benefit organisations and in terms of section 18A of the Income Tax Act, 58 of 1962).
- Administration of charitable foundations.

Day-to-day support

- Specialised client relationship management with day-to-day advice to help you navigate any operational, regulatory and compliance issues.

Find out more

If you would like to know more about how we can help you give sustainably so your contributions make a lasting positive impact, contact your wealth manager, or visit our website.

www.nedbankprivatewealth.co.za

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