

Glacier Offshore Investment Plan

If you're an investor who saw offshore as off limits, there's never been a better time to change your view. The Glacier Offshore Investment Plan is an investment solution which offers you the opportunity to invest offshore, accessing different markets and currencies with simplicity, flexibility and affordable investment minimums.







Simple investing beyond our borders

In this complicated world, simplicity is tremendously refreshing. Glacier's Offshore Investment Plan allows you to diversify your investments across markets and currencies – simply and affordably.

By diversifying your portfolio across various countries, regions, sectors and economies, you can benefit from growth opportunities offered by a wide range of industries, companies, currencies and investment philosophies, and at the same time, shield your portfolio from the poor performance of specific ones. Diversifying your assets therefore results in improved returns over the long term. Diversifying outside of South Africa can also shield your portfolio from depreciation of the rand, which tends to be a volatile currency.

The Offshore Investment Plan offers:

 <p>Affordable investment minimums</p> <p>Access to global opportunities with lower minimums than traditional offshore options.</p>	 <p>Simplicity</p> <p>A streamlined investment process with fewer take-on requirements than traditional offshore options.</p>	 <p>Liquidity</p> <p>Flexibility to add to your investment monthly by debit order or on an ad hoc basis, and to withdraw from your investment at any time.</p>	 <p>Guided investment choices</p> <p>Guidance in investment choices through risk-profiled funds and model portfolios.</p>
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Expand your investment universe

The Offshore Investment Plan allows you to invest in a range of risk-profiled model portfolios managed by a dedicated team of research and investment specialists, or if you prefer to do so, you can construct your own portfolio in collaboration with your intermediary, from a list of offshore funds carefully selected by our investment research specialists.

What do my intermediary and I consider before investing?

- Your investment objectives
- Your time horizon
- Protection from inflation
- Investments that best suit your needs



Who is it suitable for?

This investment is most suitable for entities or individuals who:

- have a long-term investment horizon
- want to diversify offshore with liquidity
- are unlikely to make withdrawals in the short- to medium term
- May want to make monthly recurring investments

United States tax residents or citizens may not invest in this investment plan.

The minimum requirements are a lump sum investment of R100 000, or monthly recurring investments of R10 000. Any other additional investments are subject to a minimum of R15 000.

Investing offshore

You can invest using your own offshore investment allowance or, if you prefer not to use it, or you have exhausted this allowance, you can make use of Sanlam's asset swap capacity. Investments and reporting are available in euros, US dollars or British pounds.

Resources



Download the resources below

[Glacier International webinar 2021](#)

[Glacier International webinar 2020](#)

[Advantages of Glacier Offshore Investment Plan](#)

[Glacier Offshore Investment Plan Brochure](#)

[Glacier Offshore Investment Infographic](#)

[Process & Document requirements](#)

[Navigate Optimised Model Portfolios](#)



Listen to the audio clips below

[Reasons to consider investing monthly and the benefits offered by the Glacier Offshore Investment Plan](#)

[Introducing the Glacier Offshore Investment Plan](#)

[Top Tips for investing offshore](#)

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The Glacier Offshore Investment Plan is a flexible, discretionary savings vehicle which offers investors the opportunity to invest offshore, accessing

different markets and currencies.

The Glacier Offshore Investment Plan is administered by Glacier Financial Solutions (Pty) Ltd.

Navigate model portfolios are managed by Glacier Financial Solutions (Pty) Ltd., a discretionary financial services provider trading as Glacier Invest FSP 770.

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