



Kuza Individual Pension Plan

2024

ABOUT US

Kuza Asset Management is an Asset Management Company, located in Nairobi, Kenya. We understand the value of building a long-lasting, trustworthy relationship with a partner who is committed to walking with you through your entire investment journey.

Key Pillars:

- Thought Leadership
- Innovation
- Competitiveness
- Trust

Highlights



Licensed as a Fund Manager and Regulated by both the Capital Markets Authority and the Retirement Benefits Authority.

Our Philosophy on Retirement

Retirement is a
Journey

We are about
nurturing this
journey with growth
Solutions for
financial prosperity

At Kuza, We value your Experience
and Financial Journey

We don't just see funds, we see
Lives; real people in their financial
Journeys.

The Kuza Experience demonstrates our Customer Centricity

Who should consider the **Kuza Individual Pension Plan?**



**Kuza
Individual
Pension Plan
(IPP)**

- Individuals looking to start a Personal Pension Plan and save for their future retirement needs.
- Those aiming to consolidate all deferred benefits held by previous employers into one personal plan for close monitoring.
- Individuals interested in starting a parallel retirement plan to augment their retirement savings and boost potential future income.
- Those seeking a plan to save specifically for post-retirement medical needs.



What makes the **Kuza Individual Pension Plan** a great choice?

The Kuza Individual Pension Plan (IPP) is tailored to suit your needs, allowing you to save for a secure financial future at your own pace while maximizing returns and taking advantage of tax exemptions. Additionally, you have the option to consolidate all deferred benefits from previous employers using this plan.

The Kuza Individual Pension Plan



Retirement Benefits Authority
Safeguarding your retirement benefits.

The Kuza Individual Pension Plan is registered by Retirement Benefits Authority under an Irrevocable Trust.

- Tax Savings
- Consolidation
- Growth

Opportunity to save on Tax

Saving into a registered pension plan enables you to claim tax exemption from your PAYE tax obligations up to Kes 20,000 per month. This boosts your earnings bottom line and preserves the purchasing power of your disposable income.

Opportunity to Consolidate your Deferred Benefits held by previous Employer Funds

Leaving your benefits scattered in your previous employer schemes is deemed to be financially irresponsible. The Kuza IPP gives you the opportunity to consolidate all these deferred benefits into one fund, bringing them closer to you to avoid the risk of having them classified as unclaimed assets in future.

Opportunity to Grow your savings in a safe environment

In this fund, you will never worry about returns or uncalculated risk exposures. The Fund is managed by Kuza Asset Management to comply with regulatory provisions as well as the accorded mandate in the prudent investment policy. Your benefits are protected and remain non-assignable.

CONTACT DETAILS

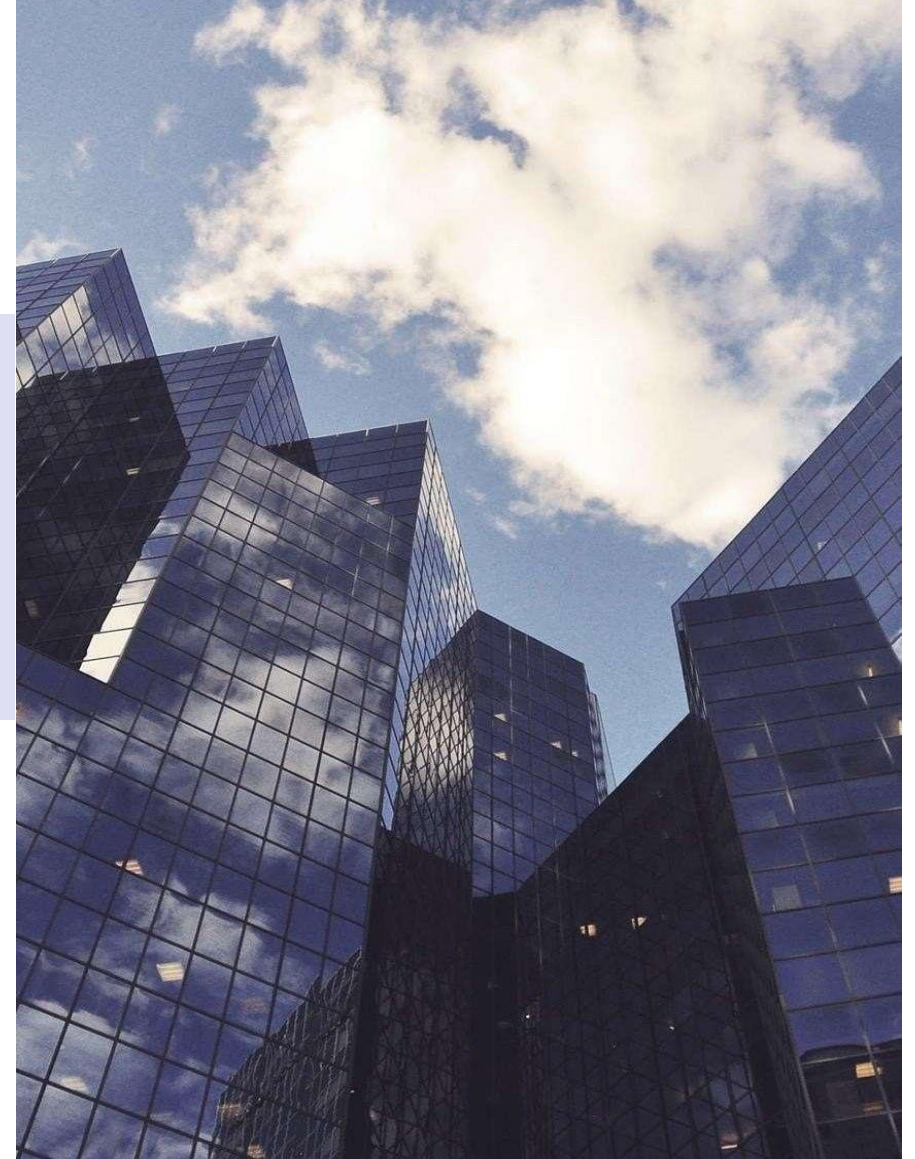
Kings Prism Tower-12th Floor, Third Ngong
Avenue

(254) 705 666 444

P.O.Box 26180-00100

info@kuza.africa

Nairobi, Kenya





Kuza
ASSET MANAGEMENT

