Kuza Umbrella Retirement Benefits Fund

2026

ABOUT US

Kuza Asset Management is an Asset Management Company, located in Nairobi, Kenya. We understand the value in building a long lasting, trustworthy relationship with a partner who is committed to walk 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

The Kuza Experience demonstrates our Customer Centricity

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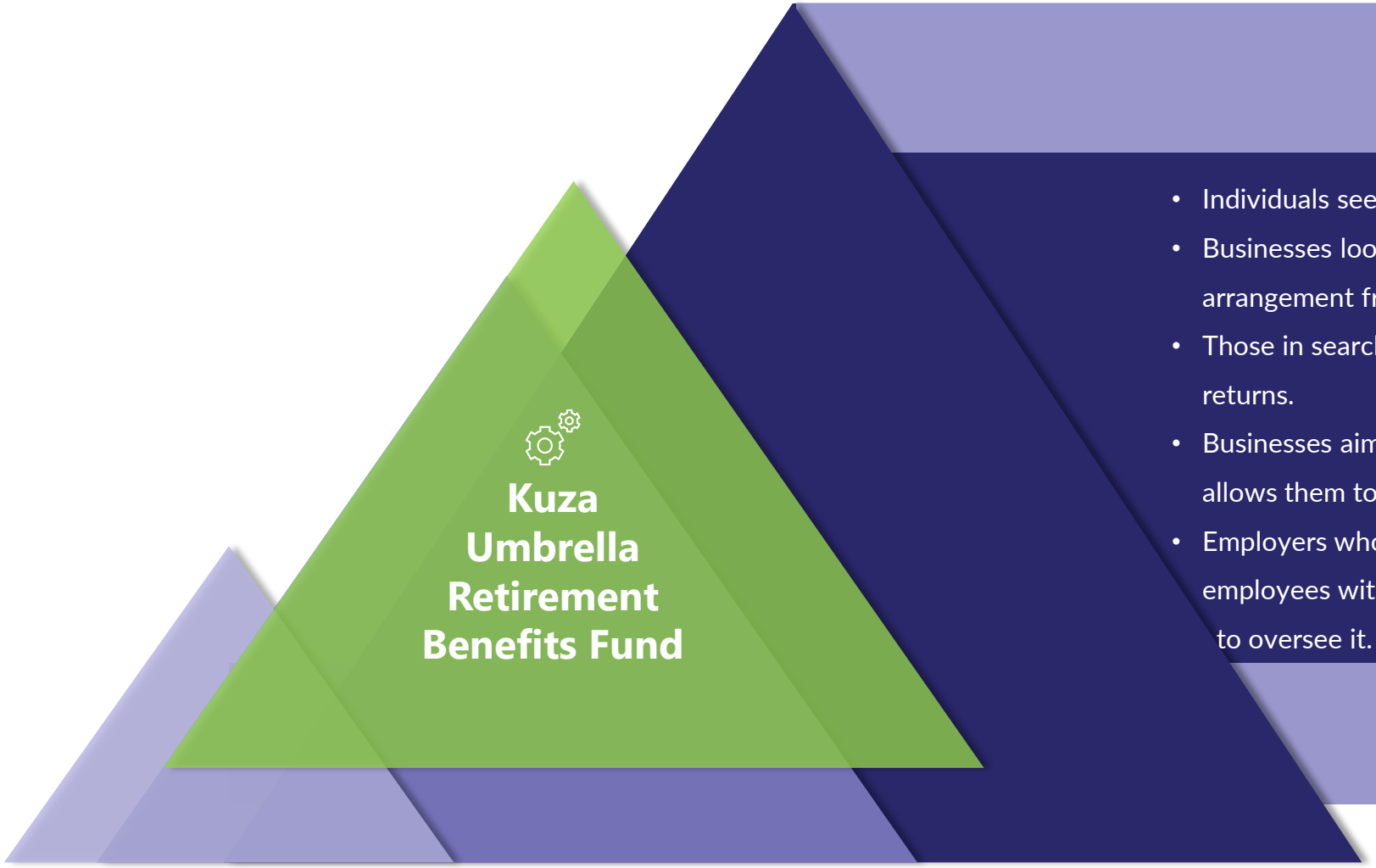
Who should consider the Kuza Umbrella Retirement Benefits Fund?



- Individuals seeking to initiate a Retirement Plan for their employees.
- Businesses looking to transfer their company's retirement arrangement from the current provider.
- Those in search of a superior fund that provides competitive returns.
- Businesses aiming for a cost-effective retirement arrangement that allows them to focus on their core operations.
- Employers who want to offer a retirement arrangement to their employees without imposing financial liabilities on those appointed to oversee it.

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What makes the Kuza Umbrella Retirement Benefits Fund a great choice?

The Kuza Umbrella is ideal for employers who want to deliver their retirement promises to their staff by adhering to an already existing scheme. You will leverage on economies of scale to achieve greater milestones better than setting up your own employer-sponsored stand-alone scheme. It also helps you to contract your staff out of NSSF Tier 2 contributions for safety and better returns.

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Kuza Umbrella Retirement Benefits Fund

- **Employee Retirement Fund**
- **NSSF Tier 2 Contracting Out**
- **Transfers in by existing funds**

The Kuza Umbrella Retirement Benefits Fund is registered by the Retirement Benefits Authority under an Irrevocable Trust.

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 benefit from economies of scale

As a participating employer, you will get the opportunity of preserving your unique identity by defining your salient features in the special rules. Costs are distributed across participating employers to achieve cost efficiency and maximized returns.

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

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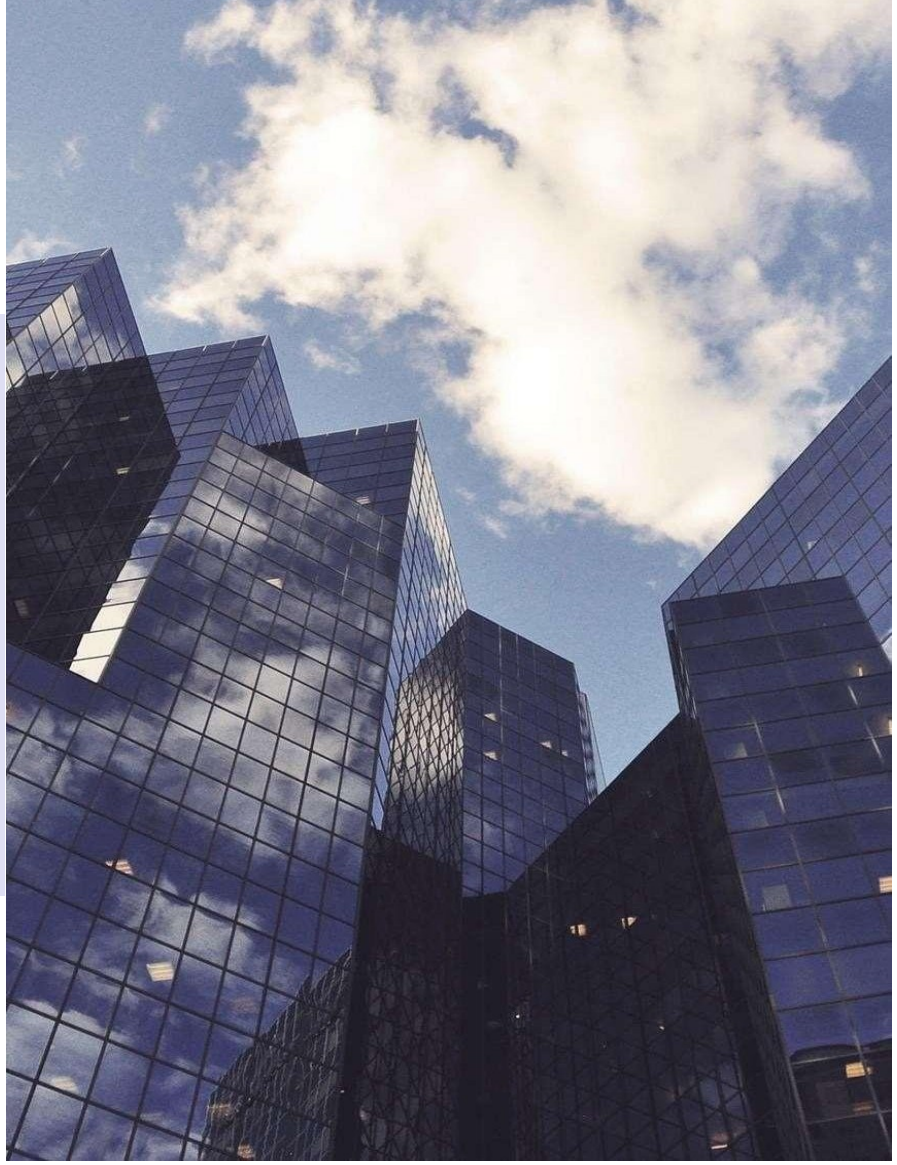

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