



# Pegasus Investment Fund

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The Pegasus Investment Fund is a registered superannuation scheme that can be tailor made to meet your personal financial goals and long-term objectives. The Fund has been operating since 1979 to provide retirement benefits for its members.

A unique feature of the fund is the ability to establish Personal Plans - a totally personal investment portfolio to meet your goals. Alternatively you can invest in the Pegasus Growth Fund or Pegasus Income Fund, where your investment is pooled with other investors.

Pegasus is managed by Perpetual Trust.

## Features

- Your personal objectives, financial circumstances and risk tolerance are assessed and a financial plan tailored to meet your needs.
- The Pegasus Investment Fund has New Zealand tax residency status (30% tax on income).
- The standard annual fee is 1.5%.
- The Fund is externally audited.
- Pegasus is registered with HM Customs & Excise (UK) as a Qualifying Recognised Overseas Pension Scheme (QROPS) for transfer of UK pensions.

## Benefits

- Access to a full range of investment options through one central account, including cash accounts, direct investments in shares, fixed interest, unit trusts and overseas investments.
- You receive personalised service with levels of communication established according to your needs.
- Your plan is monitored on an ongoing basis. This allows you to take advantage of investment opportunities when they arise.
- You receive regular reviews of your investment portfolio's progress. Additional valuation reports can be supplied between formal reviews.
- You are able to make regular or additional investments or withdrawals. Withdrawals may be subject to qualifying criteria dependant on age.
- You deal with experienced and qualified staff who all commit to ongoing training.
- The fund is tax paid, therefore returns are not included in personal tax returns.

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**An investment statement is available on request**

The content of this brochure is accurate to the best of our knowledge, but is by its nature general and so may not apply in your particular circumstances. We recommend that you seek specific advice before making decisions.

### Contact Perpetual Trust

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