

Our Esteemed Association



Advantages of Setting Up a Trust :



Asset Protection



Estate Planning & Probate Avoidance



Private & Confidential



Wealth Management & Preservation

Contact Us

Business Hours:

9am – 6pm (Monday to Friday, excluding Public Holidays)

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OCTOWILL
TRUSTEES

Wealth Creation
Specialist

“ Unlocking Wealth, Empowering Futures ”

Proven Wealth Trust 3F10 PLUS



About Company

Octowill Trustees: Your Trusted Partner in Legacy Planning and Wealth Management

Octowill Trustees Berhad boasts a team of experienced members with a collective 30 years of professional service in estate administration and wealth management. As a company operating under the Trustee Act 1949 of Malaysia, Octowill Trustees Berhad is dedicated to delivering exceptional services and is positioned to achieve significant growth as a leading trustee company in the nation. Octowill Trustees Berhad is a contemporary trust company built on traditional values, represents a harmonious union of tradition and progress.

Our foundation is rooted in timeless principles, allowing us to navigate the ever-changing landscape while staying true to the core values that have guided generations before us. With Octowill Trustees Berhad as your trusted partner, you can confidently navigate the complexities of asset transition, estate and trust administration, management of multiple asset interests, and centralized business affairs. Our unwavering commitment to excellence and fiduciary duty ensures that your interests are always protected, enabling you to leave a lasting legacy for future generation.

Disclaimer

The information contained herein is provided for general informational purposes only and should not be considered as legal, financial, or professional advice. Octowill Trustees Berhad and its directors do not warrant or guarantee the accuracy, completeness, or reliability of the information presented herein.

The description of the Octowill Trustees Berhad's background, history, and services is intended to provide an overview and does not constitute a representation or endorsement of Octowill Trustees Berhad's capabilities or results.

Any illustrations or examples of target returns are for illustrative purposes only and should not be considered as guarantees or promises of future performance. Investment returns are subject to market fluctuations and individual circumstances.

In conclusion, readers are advised to exercise their own judgment and consult with appropriate professionals before making any decisions based on the information provided in this brochure. Octowill Trustees Berhad and its directors disclaim any liability for actions taken or decisions made based on the contents herein. This brochure is for explanation purposes only and has no legal binding on Octowill Trustees Berhad or its related companies. Whilst all checking has been carried out in designing this brochure, if there exists any discrepancies which are without intentional, please refer to the actual trust deed for all terms of conditions for the Trust.

PROVEN WEALTH TRUST 3F10 PLUS

Trust Information:

| Trust Name | Proven Wealth Trust 3F10 PLUS |
|--|---|
| Tenure | 10 Years |
| Minimum Trust Amount | RM20,000.00/ Year |
| Additional Trust Amount | RM10,000.00/ Year or its Multiples |
| Payment Years | 3 Years |
| Target Annual Returns (% p.a.) | 9% p.a. |
| Additional Target Bonus Returns (% on the First Tranche of Trust Amount) | 2% (3rd year); 4% (6th year); 10% (10th year); (Applicable for Accumulation Only) |
| Disbursement of Target Returns | Annual Payout or Accumulation |
| Trustee's Remuneration | 2% p.a. |
| Early Termination Administration Fees | 30% of the Total Trust Amount in the Event of Early Termination |
| Novation | Subject to Approval |
| Other Benefits | FREE Personal Accident Insurance Coverage** |

** T&C apply

ILLUSTRATION ON TARGET RETURNS

| Year | Trust Amount (RM) | Accumulated Trust Amount (RM) | Target Annual Returns | | Additional Target Bonus Returns (On the First Tranche of Trust Amount) (Applicable for Accumulation Method only) | | Target Returns (RM) | |
|---|-------------------|-------------------------------|-----------------------|-------------|--|-------------|---------------------|-------------------|
| | | | Percentage (%) | Amount (RM) | Percentage (%) | Amount (RM) | Annual Payout | Accumulation |
| 1st | 100,000.00 | 100,000.00 | 9.0 | 9,000.00 | - | - | 9,000.00 | - |
| 2nd | 100,000.00 | 200,000.00 | 9.0 | 18,000.00 | - | - | 18,000.00 | - |
| 3rd | 100,000.00 | 300,000.00 | 9.0 | 27,000.00 | 2.0 | 2,000.00 | 27,000.00 | 56,000.00 |
| 4th | | 300,000.00 | 9.0 | 27,000.00 | - | - | 27,000.00 | - |
| 5th | | 300,000.00 | 9.0 | 27,000.00 | - | - | 27,000.00 | - |
| 6th | | 300,000.00 | 9.0 | 27,000.00 | 4.0 | 4,000.00 | 27,000.00 | 85,000.00 |
| 7th | | 300,000.00 | 9.0 | 27,000.00 | - | - | 27,000.00 | - |
| 8th | | 300,000.00 | 9.0 | 27,000.00 | - | - | 27,000.00 | - |
| 9th | | 300,000.00 | 9.0 | 27,000.00 | - | - | 27,000.00 | - |
| 10th | | 300,000.00 | 9.0 | 27,000.00 | 10.0 | 10,000.00 | 27,000.00 | 118,000.00 |
| Total Target Returns (RM) | | | | | | | 243,000.00 | 259,000.00 |
| (+) Total Trust Amount (RM) | | | | | | | 300,000.00 | 300,000.00 |
| Total Trust Amount + Total Target Returns (RM) | | | | | | | 543,000.00 | 559,000.00 |

This table is for illustration purposes only