

# overview

## What is the Sagicor Mutual Series?

The Sagicor Mutual Series is a single-premium interest-only annuity. When you invest a principal sum of money over a three, five or seven-year period, you'll receive a fixed income at a fixed interest rate.

Whether you choose to receive interest payments monthly, quarterly, semi-annually or annually, your interest rate will remain constant for the life of your contract. This means your interest rate is guaranteed until maturity

## How does the annuity work?

Sagicor will pay a fixed interest rate, which will be determined by the amount invested. At maturity, the principal is returned to the client. Should the policyholder die before the maturity date the principal plus any interest accrued is paid to the beneficiary named by the policyholder.

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# benefits

## Some of the benefits of the Sagicor Mutual Series include:

- The product is backed by a diversified pool of fixed income assets
- The plan guarantees a principal sum and a fixed stream of income
- Varying maturity terms to suit your investment needs

## Other investment options

Sagicor has a range of products ideally suited to meet the investment needs of our clients. Speak to a Sagicor advisor at 800-SAGE (7243).

# related products

## Tax-Secure-Annuity-Plan

The Tax Secure Annuity Plan is an accumulated deferred annuity plan, approved under Section 26 (individual) and under section 134-6 (corporate) of the Income Tax Act of Trinidad & Tobago.