

These are the actual surrender values of a Healthy Investment ISA (series 1).

These surrender values are based on an investment made on 31<sup>st</sup> March 2013

<b>Initial investment 31<sup>st</sup> March 2013</b>	<b>Surrender value 31<sup>st</sup> March 2023</b>
<b>£1,000</b>	<b>£1,252.08</b>
<b>£5,000</b>	<b>£6,260.39</b>
<b>£10,000</b>	<b>£12,771.19</b>
<b>£15,000</b>	<b>£18,781.16</b>
<b>£20,000</b>	<b>£25,041.55</b>

The above figures are based on our ISA (series 1) which is no longer available and includes a MVR free guarantee on the 10th anniversary which has been exercised.

Our current ISA (series 4) was launched on 1 January 2022 and includes the ability to facilitate the collection of your clients' fees.

It is also available for non-advised and introduced sales.

Past performance is not a guide to future performance.

These past performance figures were caused by higher levels of investment returns that applied in the past. If investment returns are lower in the future then it is unlikely that Healthy Investment would be able to repeat these levels of payouts in the future.

Healthy Investment is the trading name of the Rechabite Friendly Society Limited, an incorporated Society within the meaning of the Friendly Societies Act 1992.

Authorised by the Prudential Regulation Authority and regulated by the Financial Conduct Authority and the Prudential Regulation Authority. Financial Services Register 109994

2 The Old Court House, Tenterden Street, Bury BL9 0AL

0161 762 5790

[www.healthyinvestment.co.uk](http://www.healthyinvestment.co.uk)