

Strategic Vision Wealth Management

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Strategic Vision
Wealth Management



INHERITANCE TAX ‘NIL RATE BAND’ AND RATES

Inheritance Tax is charged at the following rate on death

We can help you evaluate the size of your estate, which could include assets such as property, pensions, shares and personal property, and identify the opportunities that will help you avoid or reduce the amount of Inheritance Tax your family will have to pay on your estate and enable you to preserve wealth for your dependants if the worst comes to the worst.

Inheritance Tax	Current tax year
Taxable value of your estate above which it is charged	£325,000*
Rate at which it is charged	40%

** Inheritance Tax threshold frozen (until 5 April 2018)*

This may include advising you on making appropriate provisions for vulnerable beneficiaries, and protecting their resources whilst continuing to benefit from them. You may also want to consider appointing a Lasting Power of Attorney who can manage your affairs in the event you become unable to do so.

Our aim is to maximise the inheritance your beneficiaries will receive, avoiding or minimising the amount of Inheritance Tax your family will have to pay on your estate, ensuring plans are in place to protect your property so that you are not forced to sell your home to pay for your care home costs should the need arise.

PROFESSIONAL FINANCIAL ADVICE YOU CAN TRUST

We will assess your situation and provide advice on a number of tax migration solutions, creating bespoke estate protection planning strategies that are tailored to suit you and your circumstances. To review your particular situation, please contact us for further information. Don't leave it to chance.

Information is based on our current understanding of taxation legislation and regulations. Tax assumptions are subject to statutory change and the value of tax relief (if any) will depend upon your individual circumstances. The Financial Conduct Authority does not regulate Taxation and Trust Advice or Will Writing. The value of your investment can go down as well as up and you may not get back the full amount invested. Levels and bases of and reliefs from taxation are subject to change and their value depends on the individual circumstances of the investor. Although endeavours have been made to provide accurate and timely information, Goldmine Media cannot guarantee that such information is accurate as of the date it is received or that it will continue to be accurate in the future. No individual or company should act upon such information without receiving appropriate professional advice after a thorough review of their particular situation. We cannot accept responsibility for any loss as a result of acts or omissions.