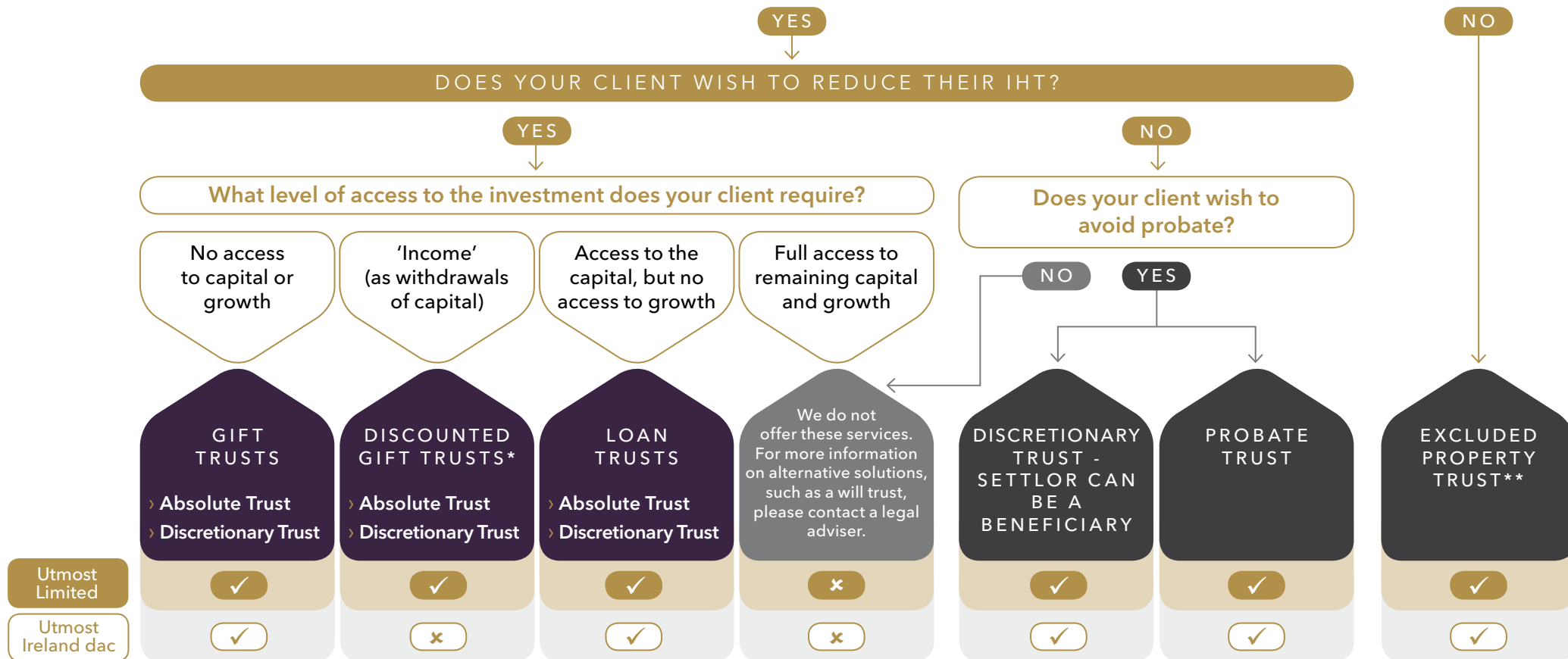


TRUST PROPOSITION TREE

TRUSTS

IS YOUR CLIENT UK DOMICILED?



* Available with Utmost Limited bonds only and allows an existing Capital Redemption Bond to be converted into a Discounted Gift Trust. Discounted Gift Trust is the generic name for these schemes.

**Changes introduced in the Summer Finance Bill 2017 mean that excluded property trusts will no longer be beneficial in sheltering assets from UK IHT where the settlor is non-domicile at the point of settlement but has a UK domicile of origin or was born in the UK.





This information is based on our interpretation of law and taxation practice in the Isle of Man, Ireland and the UK as at 1 September 2017. Tax rules may change and are subject to individual circumstances.

CONTACT US

For more information about the range of products and services we offer including our range of trusts please visit our website www.utmostwealth.com

Alternatively, please contact us on:

 +44 (0)1624 643 345

 customersupport@utmostwealth.com

Please note that emails are not secure as they can be intercepted, so think carefully before sharing personal or confidential information in this way.

Telephone calls may be recorded.

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WEALTH SOLUTIONS

A WEALTH *of* DIFFERENCE

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