



Dental & Medical Financial Management

HELPING YOU MAKE THE RIGHT CHOICE



IH Tax

## Inheritance Tax Planning SPOTLIGHT



**Is your estate valued at more than £285,000!**

### Some IHT savings tips:

- You can now help your estate save over £200,000 in Inheritance Tax! A new development in a special 'will' scheme offering tax savings. Most people pay substantial amounts of tax all their lives and then the estate pays tax all over again when they die (at a rate of 40%!). If your estate (includes home) is worth more than £285,000, **phone me for free information** on how your beneficiaries can save tax on your estate.
- A Discounted Gift Trust enables to move cash outside of your estate, gift it to your chosen beneficiaries whilst still being able to retain an income for the remainder of your life.
- Whole Life policy in trust to pay any IHT on the total values of your estate
- With a Gift Inter Vivos plan to protect an outright gift
- Or a combination of the above plans.

*This is the current understanding of legislation which may vary.*

**IHT Hotline Tel: 020 8296 1799**



**Protect your property  
and assets from IHT  
by planning ahead**



**Don't take the chance!**