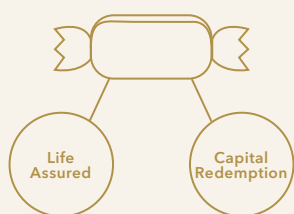


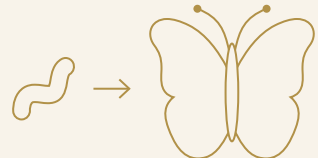






DELEGATION AT A GLANCE

Are you looking for an **externally managed solution** with a broader range of permissible assets, whilst meeting your client's changing needs?

Tax deferral	Generational tax planning	Capital growth	Supplement an income	Wider range of assets
<p>Giving you the options to build your client's wrapper, to suit their needs</p> 		<p>The assets will be managed by an external manager on a full discretionary basis</p>  <p>Access to a wider range of assets not available through a conventional bond, such as stocks and shares</p>		 <p>now and in the future</p>
<p>The option to convert a capital redemption bond</p>  <p>into a discounted gift trust</p>		<p>Use with our trust solutions</p>  <p>with the option to appoint Utmost International Trustee Solutions Limited as the professional trustee</p>		<p>To find out more about Delegation and what it could offer your client, contact us or visit our website.</p> <p> www.utmostinternational.com</p> <p> +44 (0) 203 038 3941</p> <p> info@utmostwealth.ie</p>

THINGS YOU NEED TO KNOW

- › Subject to a minimum investment of £500,000
- › Applicants must be aged 18 or over
- › Delegation has been designed for UK investors
- › The value of the bond can fall as well as rise and your client may get back less than they invested
- › The assets linked to the bond must comply with the Central Bank of Ireland's allowable assets rules as well as our investment parameters
- › The tax treatment of the bond may change and is subject to individual circumstances
- › Your client cannot influence the selection of assets linked to the bond. Your client can however provide a broad investment mandate that covers their attitude to risk and investment objectives
- › The discounted gift trust conversion and the investment conversion facility are subject to conditions.

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Promotion approved April 2025

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