

# DELEGATION AT A GLANCE

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



**Tax deferral**



**Generational tax planning**



**Capital growth**

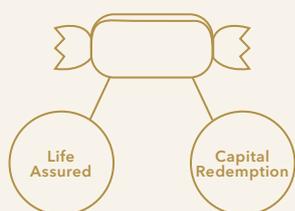


**Supplement an income**



**Wide range of assets**

Giving you the options to build your **client's wrapper**, to **suit their needs**



The assets will be managed by an **external manager** on a full discretionary basis



Access to a **wide range** of assets not available through a conventional bond, such as stocks and shares



now and in the future

The **option to convert** a capital redemption bond



into a discounted gift trust

Use with our **trust solutions**



with the option to appoint **Utmost International Trustee Solutions Limited** as the professional trustee

To find out more about **Delegation** and what it could offer your client, contact us or visit our website.

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 +44 (0) 2038 685 300  
[info@utmostwealth.ie](mailto:info@utmostwealth.ie)

Telephone calls may be recorded.

## 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 looking to invest for 5 to 10 years or longer
- › 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.

All promotional material has been approved by Utmost International Distribution Services Limited which is authorised in the UK by the Financial Conduct Authority. Financial Services register number: 1007096.

Promotion approved March 2026.

## A WEALTH *of* DIFFERENCE

[www.utmostgroup.com](http://www.utmostgroup.com)

Utmost PanEurope dac is registered in Ireland, registered number 311420. Registered Office address: Navan Business Park, Athlumney, Navan, Co. Meath, C15 CCW8, Ireland.

Utmost PanEurope dac is regulated by the Central Bank of Ireland as a Life Insurance Undertaking.

Utmost PanEurope dac is a Category A Insurance Permit holder with the Jersey Financial Services Commission.

Utmost is registered in Ireland as a business name of Utmost PanEurope dac.

The rules made under the Financial Services and Markets Act 2000 (as amended) for the protection of retail clients in the UK do not apply.

Holders of policies issued by the above registered entity will not be protected by the UK Financial Services Compensation Scheme if the above registered entity become unable to meet policyholder liabilities.

Utmost International Distribution Services Limited is registered in the United Kingdom, registered number 14137438. Registered Office address: Saddlers House, 5th Floor, 44 Gutter Lane, London, EC2V 8BR, United Kingdom.

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