

EVOLUTION AT A GLANCE

Searching for that balance between **meeting your client's changing needs** whilst managing **their investment**?



Tax deferral



Generational tax planning



Supplement an income

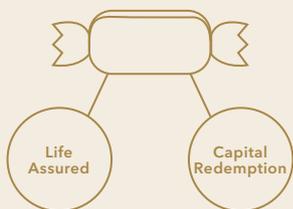


Capital growth



Extensive investment options

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



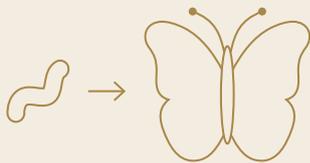
Choose from a range of investment options

Open Architecture

Platform

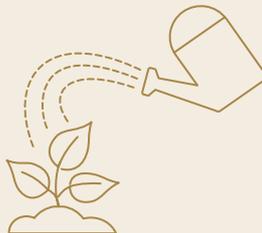
External Manager and/or Custodian

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



into a discounted gift trust*

Or use our other **trust solutions**



To find out more about **Evolution** and what it could offer your client, please visit our website.

 www.utmostinternational.com

alternatively you can call or email us on

 **+44 (0)1624 643 345**

 **customersupport@utmostwealth.com**

THINGS YOU NEED TO KNOW

- › Subject to a minimum investment amount of £50,000
- › Applicants must be at least 18 years old
- › Evolution has been designed for UK investors
- › The value of the bond can fall as well as rise. Your client may get back less than invested
- › The tax treatment of the bond may change and is subject to individual circumstances.

*Discounted gift trust conversion is subject to conditions.

A WEALTH *of* DIFFERENCE

www.utmostinternational.com

Calls may be monitored and recorded for training purposes and to avoid misunderstandings.

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AWI PR 0020 | 04/24

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