

GENERATION PLANNING BOND AT A GLANCE

Is your client looking to **maintain their lifestyle** whilst planning for **future generations**?



Generational tax planning



Supplement an income



Gift for family and friends



Help protect wealth from IHT



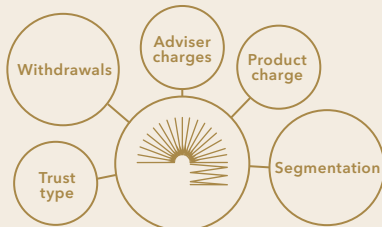
Extensive investment options

Using a Discounted Gift Trust



can reduce UK IHT liability immediately and over time

Provides flexibility at outset



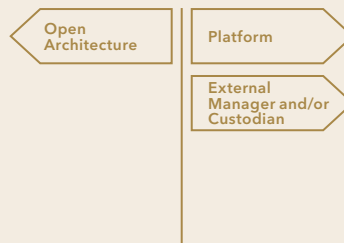
and is reassuringly inflexible throughout the applicant's lifetime**

The client will receive regular **withdrawals***

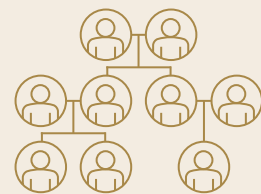


up to 5% of the premium is tax-deferred per year

Choose from a **range** of investment options






The bond can **continue long after** the applicant's death



for up to 99 years

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

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Telephone calls may be recorded.

THINGS YOU NEED TO KNOW

- › Subject to a minimum investment amount of £50,000
- › Applicants are underwritten at outset and their age **cannot** exceed 90 years next birthday
- › The Generation Planning Bond has been designed for UK investors with an IHT liability
- › The value of the bond can fall as well as rise and the trustees may get back less than invested
- › The tax treatment of the bond may change and is subject to individual circumstances.

*Withdrawals **cannot** be amended and will continue for the lifetime of the applicant or until the bond value reduces to zero

It is important to note that, once set up, the bond **cannot be surrendered or assigned during the applicant's lifetime.

A WEALTH *of* DIFFERENCE

www.utmostinternational.com

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