






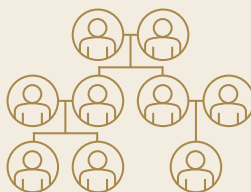
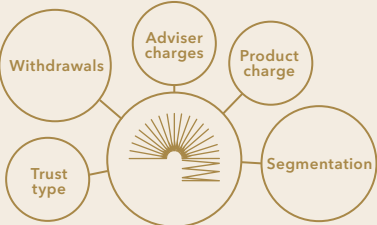
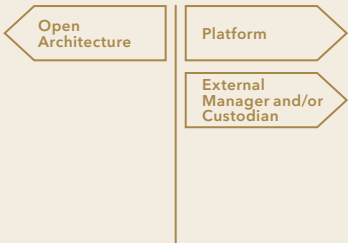





GENERATION PLANNING BOND AT A GLANCE

Is your client looking to maintain their lifestyle whilst planning for future generations ?				
 <p>Generational tax planning</p>	 <p>Supplement an income</p>	 <p>Gift for family and friends</p>	 <p>Help protect wealth from IHT</p>	 <p>Extensive investment options</p>
<p>Using a Discounted Gift Trust</p>  <p>can reduce UK IHT liability immediately and over time</p>	<p>The client will receive regular withdrawals*</p>  <p>up to 5% of the premium is tax-deferred per year</p>	<p>The bond can continue long after the applicant's death</p>  <p>for up to 99 years</p>		
<p>Provides flexibility at outset</p>  <p>and is reassuringly inflexible throughout the applicant's lifetime**</p>	<p>Choose from a range of investment options</p> 	<p>To find out more about Generation Planning Bond and what it could offer your client, contact us or visit our website.</p> <p> www.utmostinternational.com</p> <p> 0845 602 9281</p> <p> info@utmostwealthsolutions.ie</p> <p>Telephone calls may be recorded.</p>		

THINGS YOU NEED TO KNOW

- › Subject to a minimum investment amount of £50,000
- › Applicants are underwritten at outset and their rated age must **not** exceed 94 years
- › 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

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

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