

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

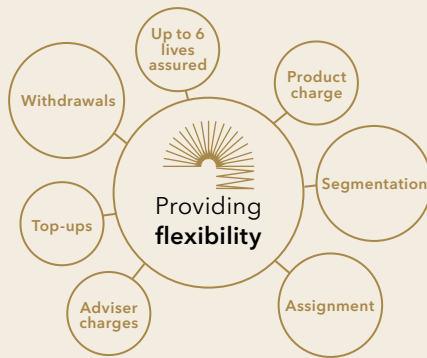
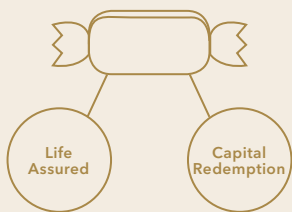


Capital growth



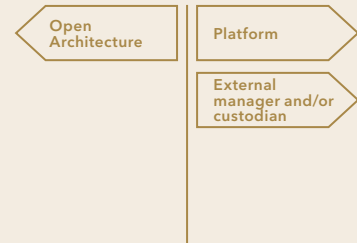
Extensive investment options

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

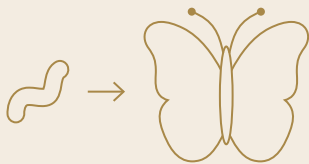


now and in the future

Choose from a range of **investment options**

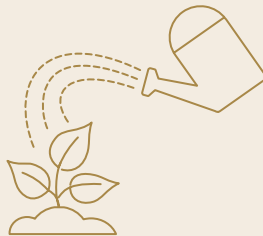


The **option to convert** a capital redemption bond



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.utmostwealth.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

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