

DELEGATION AT A GLANCE

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



Tax deferral



Generational tax planning



Capital growth

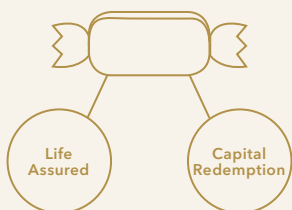


Supplement an income



Wider 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

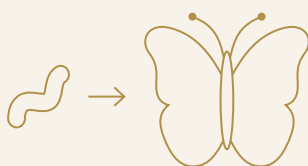


Access to a **wider range** of assets not available through a conventional bond, such as stocks and shares



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 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.

- www.utmostinternational.com
- 0845 602 9281
- info@utmostwealth.ie

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
- › 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.

A WEALTH *of* DIFFERENCE

www.utmostinternational.com

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

Utmost PanEurope dac is regulated by the Central Bank of Ireland (No 311420). Its registered office is Navan Business Park, Athlumney, Navan, Co. Meath C15 CCW8, Ireland. Utmost PanEurope dac is a Category A Insurance Permit holder with the Jersey Financial Services Commission.

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

All promotional material has been approved by Utmost Limited which is authorised in the UK by the Financial Conduct Authority. Financial Services register number: 160418.

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.

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