

DELEGATION AT A GLANCE

Are you looking for a **discretionary 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

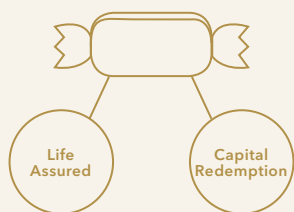


Wider range of assets



Discretionary managed product

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



The assets are always managed by a **discretionary manager** on a full discretionary basis



Access to a wider range of assets not available through a conventional bond



The Discretionary Manager can **invest directly** into assets such as stocks and shares



These investments frequently offer lower costs when compared to collectives and cash

Use with our **trust solutions**



To find out more about **Delegation** 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

Telephone calls may be recorded

THINGS YOU NEED TO KNOW

- › Subject to a minimum investment of £100,000.
- › Applicants must be at least 18 years.
- › Delegation 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 assets linked to the bond must comply with the Central Bank of Ireland's allowable assets rules as well as our investment guidelines.
- › The tax treatment of the bond may change and is subject to individual circumstances.
- › The investor can only provide a broad investment mandate that covers their attitude to risk and investment objectives. They cannot influence the selection of assets linked to the bond.

A WEALTH *of* DIFFERENCE

Utmost Wealth Solutions is the trading name used by a number of Utmost companies. Utmost Trustee Solutions is the trading name used by Utmost Trustee Solutions Limited. This item has been issued by: Utmost Ireland dac.

The following companies are registered in the Isle of Man: Utmost Limited (No 056473C), Utmost Administration Limited (No 109218C) and Utmost Trustee Solutions Limited (No 106739C), which are regulated or licenced by the Isle of Man Financial Services Authority. Utmost Services Limited (No 059248C) is not regulated. Each of the above companies has its registered office at: Royalty House, Walpole Avenue, Douglas, Isle of Man, IM1 2SL British Isles.

The following companies are registered in Ireland: Utmost Ireland dac, trading as Utmost Wealth Solutions, is regulated by the Central Bank of Ireland. Its registered number is 303257 and it has its registered office at: Ashford House, Tara Street, Dublin 2, D02 VX67, Ireland. Utmost PanEurope dac, trading as Utmost Wealth Solutions, is regulated by the Central Bank of Ireland. Its registration number is 311420 and it has its registered office at: Navan Business Park, Athlumney, Navan, Co. Meath C15 CCW8, Ireland. Its FCA number is 426350. Both companies are authorised by the Financial Conduct Authority in the UK for Conduct of Business Rules.

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