

Inheritance Tax Planning

If you want to be sure your lifetime's wealth can be enjoyed by your family, friends and chosen beneficiaries, then inheritance tax planning is essential to that aim – and we can provide all the knowledge and expertise to limit your future liability for tax as much as you can.

With the rise in property prices over the years, an ever increasing number of people are becoming liable to inheritance tax – and that could have a significant effect on the value of your estate and any legacies or bequests you make.

At Charlwood, our specialist expertise in these matters gives you a viable and practical way to minimise your tax liability – by carefully structuring your financial affairs so that you're able to fully benefit from all of the exemptions and reliefs to which you're entitled.

We may recommend investments or trusts, talk to you about lifetime transfers or assurance plans, clearly explain the benefits and consequences of each different route – and whatever the best solution, you can be sure our proposals will meet your particular requirements as appropriately and effectively as possible.



For more information on inheritance tax planning or any of the other services we provide, simply call us on 01202 516516



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www.charlwoodifa.com