



Redmayne
Bentley



Inheritance Tax Planning

Understand your potential Inheritance Tax liability with a personalised fixed-fee report from a Redmayne Bentley Financial Planner.

MORE FAMILIES ARE BEING AFFECTED BY INHERITANCE TAX

When you've worked hard to build your wealth, you want to make sure more of it can be passed on to the people who matter most.

Frozen allowances, rising property values and pension legislation changes mean Inheritance Tax (IHT) may affect more families than ever before.

The people you choose to benefit, the timing of your gifts, and the way in which you pass on your wealth can all have a significant impact on your estate's IHT liability.

Our Inheritance Tax Planning Service provides a clear outline of your likely Inheritance Tax liability and the options you have to mitigate it.

A CLEARER UNDERSTANDING OF YOUR ESTATE

Your Inheritance Tax Review will provide:

- ✓ An understanding of your potential IHT liability for a **one-off fixed fee of £500 + VAT**.
- ✓ A personalised report based on your assets, pensions and estate.
- ✓ The information you need to decide what happens next.



THINGS TO CONSIDER

- From April 2027 some pensions are included in the value of your estate for IHT purposes.
- Do you know if you will qualify for the full Residence Nil Rate Band (RNRB)?
- Have you made gifts to your family in the last seven years?

A SIMPLE TWO-STEP PROCESS

1. Understand Your Position

We assess your estate to calculate your potential Inheritance Tax exposure.

Your report includes:

- ✓ Review of your estate and assets
- ✓ Estimated Inheritance Tax liability
- ✓ Consideration of assets and legal structure
- ✓ Potential planning options and opportunities

There is no obligation to proceed with further advice.

2. Explore Your Options

If appropriate, we can discuss planning strategies such as gifting, trusts and tax-efficient investments (additional fees apply).

Our advice is likely to include recommendations around investing, so it is important to remember the value of investments can fall as well as rise, and you could get back less than you invested.

Tax treatment depends on individual circumstances, legislation and regulation which may be subject to change in the future. The Financial Conduct Authority does not regulate taxation or trust advice.





TO FIND OUT YOUR CURRENT
INHERITANCE TAX LIABILITY:

Call:
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Email:
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Visit:
redmayne.co.uk/iht-planning

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