

Ensuring your
assets are
protected

Financial
confidence
by design





Protection

Trentham Invest are here to unravel the complexities of finance for you

Our goal is to empower you to make your own financial decisions by presenting information in an easy to understand way. We take complex pieces, make them simple and remodel them to suit you.

We believe in predictability

We challenge conditioned thinking in order to maximise every possible opportunity. This provides the freedom to enjoy life in complete confidence.

Our unique ways

We unravel: separating the elements into their constituent parts then putting them into a logical order.

We de-mystify: translating the jargon and gobble de gook into your language, plain English, so you understand the game you're playing.

We maximise: building something useful and purposeful for you.

Your reward

We will sit and have the conversation with you to establish what your estate and life means to you.

We will use our experience and expert knowledge of the legal and financial aspects of the pensions and investments industry to design a bespoke protection plan for you.

The protection we create will then be guarded, closely scrutinised and maintained so long as we are working for you, so you can rest assured your pension and investments are being looked after.

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Ensuring your

Estate planning concerns

“So you don’t think you need to do anything to mitigate Inheritance Tax?”

“Inheritance Tax is only paid by the rich and anyway all my assets will pass to my spouse.”

“I have considerable assets but need the income to live well.”

“It all sounds very complicated to me.”

“Its not an issue as my estate can pay any tax owing.”

“Can’t I give some of my capital to my children whilst I am still alive?”

“I have taken some life assurance policies so I am alright surely?”

Food for thought

- Inheritance Tax is in essence a voluntary tax as there are many steps one can take to mitigate its effects.
- First it is essential to make a will to ensure the benefits of your Estate pass to those you choose, as opposed to those chosen by the State.
- Then make a Will Trust so you can benefit from utilising the nil rate band for both spouses, which could save you in excess of £100,000 in unnecessary tax payments.
- Where possible ensure all insurance policies are written in Trust. Protect the value of your Estate and do not increase the tax burden.
- Trusts can be arranged to safeguard your assets, but significant changes in the budget 2006 have restricted choice.

assets are protected

If this is you? Get in touch



You've accumulated
a financial estate of
complexity for yourself.



You consider professional
relationships as an
investment, not a cost.



You desire a clear
vision for a secure
financial future.

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PENSIONS



PROTECTION



INVESTMENTS



FINAL SALARY
PENSIONS

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