
Succession
Planning
Seminar
FREE
Turn Over for More
Information
Wealth
If you were future confident, would
you preserve it for your family or
just leave it to chance?
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Succession Planning Seminar

In a world of increasing complexity, insufficient time and persisting uncertainty - harnessing your wealth is more important now than ever before.

Inheritance tax, divorce and creditor claims usually lead to sudden dramatic loss. Inflation risk and market volatility can hinder true investment returns.

We can help you achieve more,
so you don't just leave it to chance!

Our **Free Succession Planning Seminar** details effective, tried and tested later life planning techniques that can be applied to your own situation. You should attend if:

- You need to understand and manage investment risk.
- You want to reduce the burden of inheritance tax (IHT).
- You wish to protect assets for loved ones, or bloodline.

Why not join us to see for yourself?

Part 1 Perpetuate 'Liquidity' Power

By 'liquidity' we mean the value of your savings and investments, which unlike your home, may support your lifestyle. Interest rates fell to just 0.25% in August 2016 (after the BREXIT vote) and global stock markets remain volatile. **How can you make good returns?** This part explains how a rigorous approach to money management can help you control risk, buy low and sell high.

Part 2 IHT! The Last Big Tax Hurdle

Most people hold the majority of their assets directly, so they are not left wanting. You may need to supplement retirement income or cover the cost of long term care, but this strategy could result in unnecessary IHT. **Can you have your cake and eat enough?** This part offers an insight into restructuring your assets, to reduce IHT, whilst you retain access and keep control.

Part 3 Thinking About Your Estate?

It is rather unfortunate that most people do not make the most of their opportunities. This is usually due to lack of clarity about how to utilise specific assets or how best to make provision for your beneficiaries. **What common planning errors could you avoid?** This part clarifies how to think about certain assets and introduces some very popular planning techniques.

What happens on the day?

Each part of our Succession Planning Seminar begins with a 45 minute presentation that is followed by individual questions from our guests. Approximate timings are:

10:00am	Arrival, Registration & Refreshments	
10:30am	Part 1	Perpetuate 'Liquidity' Power
11:30am	Part 2	IHT! The Last Big Tax Hurdle
12:30pm	Part 3	Thinking About Your Estate?

Attend without obligation:

Our seminar is free to attend without obligation, and if you decide to proceed, we would be happy to work on fixed fees agreed with you at outset so you always know where you stand.

We look forward to welcoming you!

How to reserve your place?

Our seminar is intended as an awareness event for information only. All guests are therefore advised to obtain specific regulated advice before taking action. Please reserve:

By Phone Call the Reservation Line on **0800 321 3074**

By E-mail Send your request to **events@equilius.com**

3 HOURS of YOUR LIFE COULD HELP YOU CHANGE THE DESTINY of YOUR WEALTH forever

CALL RESERVATION LINE 0800 321 3074

Established in 2002, our firm has grown by helping many people achieve all sorts of things in the context of succession planning. Most of our clients secure a lifetime of income, with generous access to capital, whilst preserving a substantial, protected legacy for their chosen beneficiaries.

You can anticipate the future,

.....by making careful plans today.

We believe that you should know what to do with your estate, so like our existing private clients, you too can get better outcomes. Ensure to attend our Succession Planning Seminar by calling 0800 321 3074 today.

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