HOW TO PASS MORE OF YOUR WEALTH TO YOUR FAMILY

Generational
PLANNING GROUP

FORCES PENSION SOCIETY

8th SEPTEMBER
1PM

Recent Budget Changes
Understand how the latest Budget announcements could affect your financial and estate planning.
Topics include:

- How pension funds will be assessed for tax on death.
- The inheritance tax (IHT) reliefs available and how you may benefit from them.
- Strategies to help preserve the value of your pension fund for future generations.
- Recent changes affecting AIM shares and Business Relief.

Inheritance Tax & Legacy Planning
Discover practical and legitimate ways to protect your family's wealth.
Topics include:

- Legal strategies to reduce the impact of Inheritance Tax on your estate.
- How simple trusts work and when they may be appropriate.
- How to invest funds that could become free from Inheritance Tax after just two years (subject to legislation and qualifying investments).
- Straightforward trust solutions to help fund grandchildren's education, assist with property purchases, and support future generations.
- How to gift money while retaining appropriate access and control where possible.

Dealing with Property Within Your Estate
Learn how property ownership can affect your estate and the planning opportunities available.
Topics include:

- How the additional Residence Nil Rate Band can increase the tax-free allowance to up to £1 million for qualifying couples.
- Removing retained practice premises from your estate for Inheritance Tax purposes.
- Planning for second homes and buy-to-let investment properties.
- Preparing for potential upfront Inheritance Tax liabilities on property.

Planning for Future Care Costs
Explore effective ways to prepare for the potential cost of later-life care while protecting your assets and maintaining financial flexibility.

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