



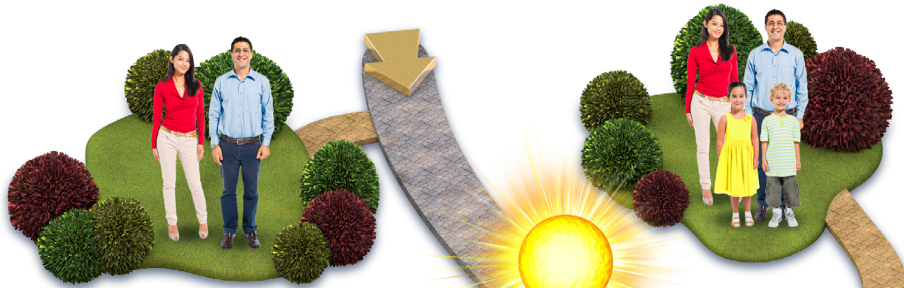
Tailored Estate Planners

# Your will is a love letter!

Planning our will and succession is a journey. What we need to consider is flowing as we progress in life. Revisiting our plans to ensure they are in line with your current objectives is important.

We help you find the right solutions for you and your family whether it is just a **typical will** or a **will trust** to protect assets and mitigate future inheritance tax (IHT), a **lifetime planning** to gift and protect assets in an "IHT friendly" way or to protect your family should you lose mental capacity with a **Lasting Power of Attorney (LPAs)**.

## So! What should I think about?



### Couple no children yet!

- Pass my estate to my partner/spouse?
- Other family members?
- Some to charities?

### Now we have children



- Who should be the guardians?
- At what age should children inherit?
- What if one of us decease too early?
- What if the widow/widower remarries?
- What can affect my children inheritance?



### I have Wealth:

#### Business Assets:

- Did I plan the succession for my business?
- Should I pass to my spouse or my children?
- How can my spouse still benefit?
- Protect the shares from divorce or bankruptcy?
- What if I lose mental capacity?

#### Real Estate portfolios:

- I don't want it to go in IHT!
- I want it to benefit future generations.
- I want to optimise the revenue.
- I want to protect it for my children.



### My children are adult now!



- Is it time to think about mitigating inheritance tax?
- What if I gift assets and my child divorce or goes bankrupt?
- Can I protect my house if I need to go into a care home?
- How can my spouse still benefit from our wealth?
- What if I die and my spouse remarries?
- Can I provide for my grandchildren?



### Those unplanned moments:

#### if I lose mental capacity: (LPAs)

- What happen to my finances?
- How can my family be provided for
- Who can make decisions for my health?
- Who can manage my rental properties?
- Who can manage my business?
- What if I do not have LPAs in place?

#### My children:

- How can they keep their inheritance intact if they divorce or become bankrupt?
- How can I provide for a disabled child?
- Can my wealth pass to future generation without IHT?



### Remarried or widowed – children and stepchildren?

- Did I protect the children inheritance of their deceased parent?
- How do we share our wealth across the reformed family?
- How can my spouse still benefit from our wealth?
- How do I mitigate IHT?
- Can I protect my house if I need to go into a care home?



Contact us

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