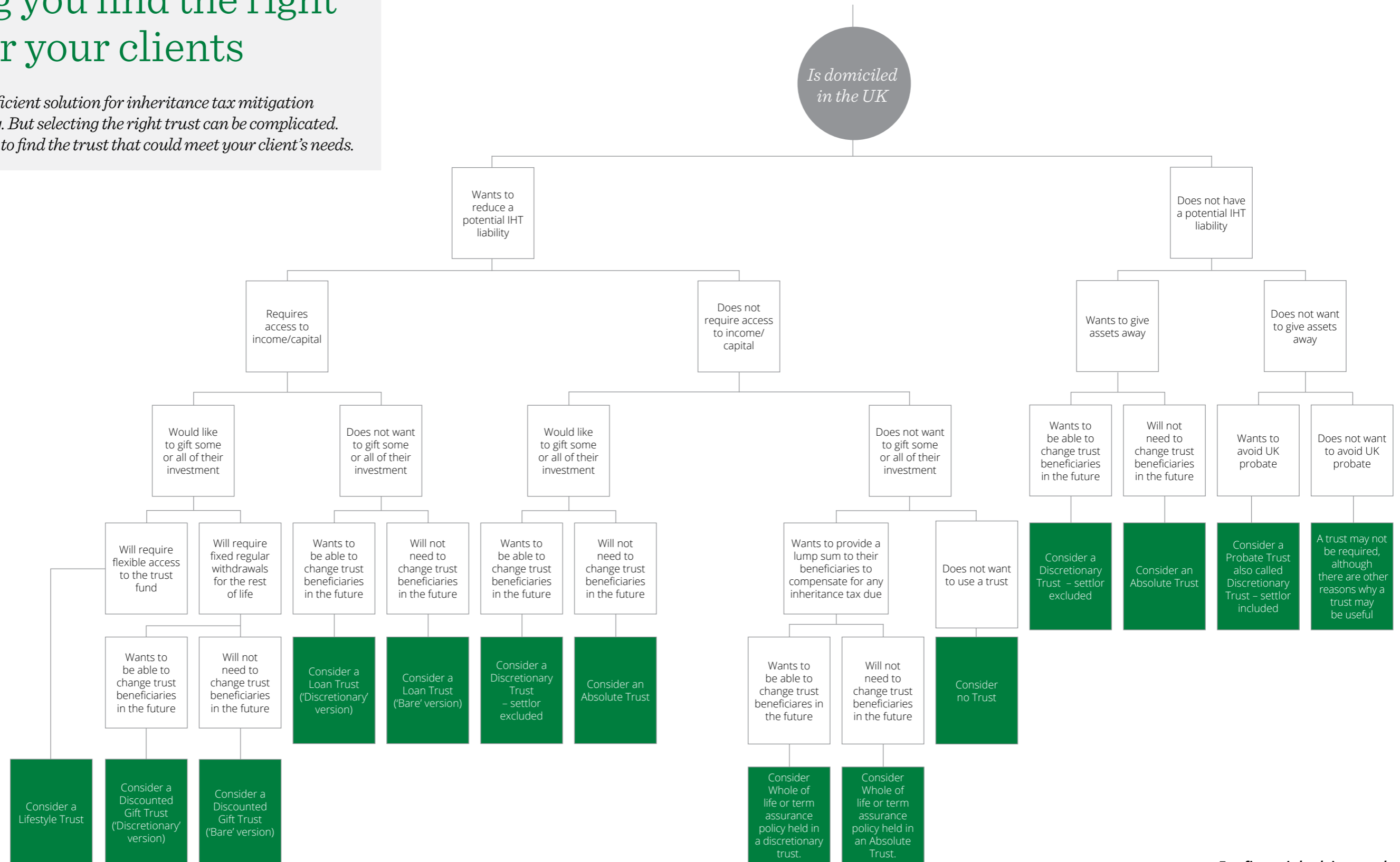


Helping you find the right trust for your clients

A trust can be an efficient solution for inheritance tax mitigation and estate planning. But selecting the right trust can be complicated. Follow this journey to find the trust that could meet your client's needs.

My client



This document is based on Quilter's interpretation of the law and HM Revenue and Customs practice as at September 2023.
We believe this interpretation is correct, but cannot guarantee it. Tax relief and the tax treatment of investment funds may change.

quilter.com

Please be aware that calls and electronic communications may be recorded for monitoring, regulatory and training purposes and records are available for at least five years.

Quilter is the trading name of Quilter Investment Platform Limited which provides an Individual Savings Account (ISA), Junior ISA (JISA) and Collective Investment Account (CIA) and Quilter Life & Pensions Limited which provides a Collective Retirement Account (CRA) and Collective Investment Bond (CIB).

Quilter Investment Platform Limited and Quilter Life & Pensions Limited are registered in England and Wales under numbers 1680071 and 4163431 respectively.

Registered Office at Senator House, 85 Queen Victoria Street, London, EC4V 4AB, United Kingdom. Quilter Investment Platform Limited is authorised and regulated by the Financial Conduct Authority. Quilter Life & Pensions Limited is authorised by the Prudential Regulation Authority and regulated by the Financial Conduct Authority and the Prudential Regulation Authority. Their Financial Services register numbers are 165359 and 207977 respectively. VAT number 386 1301 59.

QIP 20882/61/3854/September 2023