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is for long-term

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advantage of this national trend as a way to diversify your services and significantly increase your profit base, this book is for you. Based on author Doug H. Moys more than twenty-five ...

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ongoing coronavirus  
(COVID-19) pandemic  
has served as a  
reminder of the  
importance of  
planning for the  
future and having  
your affairs in order.  
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worked hard and

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invested carefully to build your wealth, you want to look after it. That ' s why it ' s important to...

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the wealth you've amassed through hard work, inheritance or good fortune. Inside our guide, we look at the number of key areas that will enable you to put in place an effective protection planning strategy to preserve and protect your wealth for you and ...

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part of your

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planning, you may

want to consider

putting assets in trust

– either during your

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lifetime or under the terms of your Will.

Putting assets in trust – rather than making a direct gift to a beneficiary – can be a more flexible way of achieving your objectives.

### ~~GUIDE TO WEALTH PRESERVATION~~

Thorough estate planning helps



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Preserve your family's wealth by removing your name from your assets and putting them into legally-protected vehicles, such as trusts or limited liability entities....

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Effective tax planning

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and restructuring your finances can reduce the amount of tax you pay by ensuring you claim all your tax allowances and reliefs. Another way to preserve wealth is to have the right protection policies in place to keep you and your family financially secure should the

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Unexpected happen.

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~~Preserving Your~~

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The preservation of wealth for the super-rich usually entails:

Wide diversification at the expense of higher returns.

Reduced volatility. A focus on real assets

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such as property and gold. Investment in illiquid and unlisted securities and companies. Paranoia over taxes.

~~The preservation of wealth – Monevator~~

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With the help of an~~

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adviser, Barry decides to place the £150,000 from his ISA into our Wealth Preservation Account. When Barry 's money has been in the trust for seven years, it will move outside of his estate. This means that there ' ll be no inheritance tax to pay on it. Accessing the investment

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~~Trust - Canada Life~~

~~UK~~

By using a Wealth

Preservation Trust,

Betty would receive

the peace of mind

knowing that her

assets in the trust are

protected, regardless

of what happens to

her health. However,

there are a couple of

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big things you need to know if you are interested in this type of planning. First, any assets transferred into a Wealth Preservation Trust are ...

~~What is a Wealth Preservation Trust and Do you Need One?~~

The wealth

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preservation phase.

Earlier, I mentioned that there are three distinct periods in

ones financial life cycle, including: The earn to spend phase.

The earn to save phase. The wealth preservation phase. I

also mentioned, that in each phase of your financial life cycle

there are a number of

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things you need to do.

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Wealth preservation through the generations and minimising the impact of inheritance tax (IHT) on their estate is an understandably key concern for our clients. We aim to

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Remove any uncertainty by explaining regulations, reviewing any existing plans to ensure they are structured in the right way, discussing how investments and pensions work from an inheritance point of view and introducing what measures can be

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taken to be more  
efficient in this area.

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Europe Account . The

Irish Revenue

Commissioners have

confirmed that

discretionary fund

management services

are not chargeable to

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VAT under the Value Added Tax Consolidation Act 2010. As long as the assets being managed are classed as a pooled fund portfolio bond and not a highly personalised bond.

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