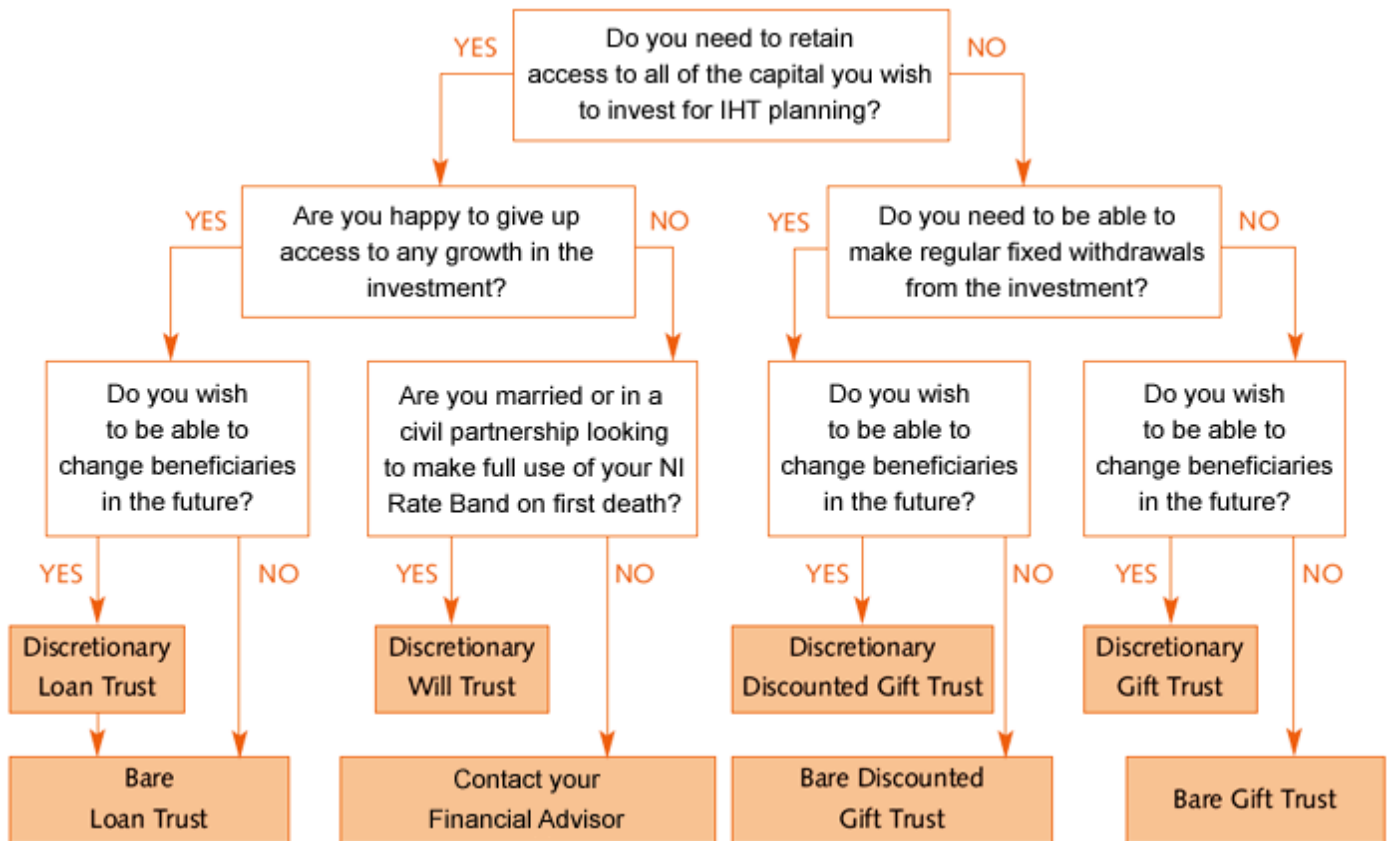




WHICH TRUST?

Henwood Court's trust range provides a balance between tax efficiency and flexibility – depending on your required level of control and access to the investment.

Recommending an appropriate trust arrangement



Investment flexibility ideal for management under trust

Our trust arrangements are used in conjunction with the Investment Bond. With up to 99 truly individual policies, trustees can build separate portfolios for each potential beneficiary with their own investment and withdrawal strategies.

This can help trustees fulfil their duty to ensure fairness between different beneficiaries and enable them to take into account the wishes of the Settlor.

Robust trust wording and processes

To be confident in our trust offering, we undertook extensive consultation with HMRC and sought Council's opinion and worked with third party tax and trust specialists Technical Connection when drafting both our trust wording and processes. Full trust documentation is provided for your convenience.





Please note this decision tree is for illustration purposes only. Suitability of trust arrangements for particular clients will depend upon individual circumstances.

For more detailed information contact your Financial Advisor.

For further information please call 0845 0551970 or go to www.henwoodcourt.com



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