



Estate Planning Healthcheck

Have you recently considered whether there would be any Inheritance Tax on your death and how your family would pay it?

If you have a partner, do you know how the survivor of you would be placed financially if one of you died?

Although these are vitally important questions, most of us are too busy to give time to addressing them and there is always the uncertainty whether a solicitor, accountant or financial adviser is best placed to help answer them.

We offer a fixed-price estate planning healthcheck, comprising a meeting with a Partner or Associate at Burges Salmon, to review your affairs and to include (where relevant) the following:

Inheritance tax

- eligibility for reliefs (e.g. for your business or agricultural assets)
- the use of trusts, during your lifetime and on death
- gifts to reduce inheritance tax
- the suitability of insurance related products, including discounted gift trusts

Capital Gains Tax

- entrepreneur's relief
- second homes and main residence relief
- rollover and holdover reliefs

Estate planning

- a Will review
- integration of Will with pension death benefits and life assurance
- Lasting Powers of Attorney
- initial view on any residence, domicile and foreign property issues.

The fee is £850 plus VAT for the meeting to include a written summary of the advice given at the meeting. If you instruct us to undertake any further work, this is charged at our normal rates.

If you are interested in this service, please tick the box for Estate Planning Healthcheck on the form attached to the letter we have sent you. On receipt of the form, we will contact you to discuss the next steps, including when to meet and any documents that we will need to see.

I/We would like to use your Estate Planning Healthcheck Service

Name
Home address
Postcode
Telephone (switchboard/direct/home - delete as applicable)
Fax (switchboard/direct/home - delete as applicable)
Email

Please fax your completed form to: Jim Aveline, Burges Salmon on 0117 902 4400

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