INHERITANCE
PLANNING COMPANY

Explore Our Tailored Will Solutions

Every family is unique, and so are their estate planning needs. A tailored will ensures your assets are distributed exactly as you wish while addressing complex family dynamics, minimising inheritance tax, and providing long-term financial protection for your loved ones.

Why Consider a Tailored Will?

Customised to Your Needs
A tailored will accounts for your specific circumstances, whether you're single, married, cohabiting, or have a blended family.

Minimises Risks
Avoid disputes and challenges by providing clear instructions for asset distribution.

Maximises Tax Efficiency
Strategically structured wills can reduce inheritance tax liabilities, ensuring your wealth is preserved for future generations.

Common Scenarios for Tailored Wills

Blended Families
Example: Protect assets for your children from a previous relationship while ensuring your current spouse is supported.

Young or Vulnerable Beneficiaries
Example: Use a trust to provide financial security for young children or those with disabilities without risking mismanagement of funds.

Cohabiting Partners
Example: Ensure your partner inherits your share of the family home, as cohabitees are not entitled to automatic inheritance under intestacy laws.

Business Owners
Example: Safeguard business assets for future generations while ensuring continuity and avoiding excessive inheritance tax.

Example: A Blended Family Solution

Sarah's Story
Sarah remarried and wanted to ensure her children from her first marriage inherited her family home while still providing for her new spouse. By using a **Life Interest Trust,** Sarah's husband was able to live in the house during his lifetime, with ownership passing to her children after his death. This approach prevented disputes and preserved the family's legacy.

Key Features of a Tailored Will

Trusts for Asset Protection
Create specific trusts to manage inheritance and ensure assets are distributed as intended.

Executor and Guardian Selection
Appoint trusted individuals to manage your estate and care for minor children.

Tax-Efficient Planning
Use nil-rate bands, lifetime gifts, and charitable donations to reduce inheritance tax.

Specific Provisions for Heirs
Include conditions or restrictions for inheritance, such as age limits or educational milestones.

How We Can Help

At the Inheritance Planning Company, we specialise in creating bespoke wills that:

- Reflect your family's unique needs and dynamics.
- Maximise tax efficiency to preserve your estate.
- Provide clear, enforceable instructions to minimise disputes.

Start Protecting Your Legacy

Contact us today for a free consultation and explore how a tailored will can secure your family's future and give you peace of mind.

Disclaimer:

This information is correct as of September 2024. Legal updates or changes may have occurred since then. For the most current advice, please contact **Inheritance Planning Company Ltd** at:

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