

If you previously worked in the UK and you have a British pension\*, this FREE brochure will assist your understanding of the benefits you hold

# British pension taxes and death considerations

**You want to know the benefits of holding a British pension\* for your beneficiaries and yourself**

## Know the FACTS!

1. When compared with “trusts” a British pension\* held in the UK is tax efficient upon access and for investments. It also has legislative protections that are not available to trusts.
2. It is possible to CASCADE wealth through generations legally and tax efficiently.
3. “Family Trust Funds” and “QROPS” would love to have the benefits available within UK pensions.
4. You should never, in our opinion, take advice about the transfer from one party (who you may never have met) and then do a transfer and the ongoing investments with a second party.

\* These are invested British Pensions such as Money Purchase Pensions and this brochure focuses on only those, excluding state pensions, state backed guaranteed schemes (such as the NHS or Military, etc.), Defined Benefit and some Safeguarded schemes. Contact us for more information if you are unsure what you hold

## Key points that everyone should know -

NEW changes to legislation in April 2015 made British pensions one of the greatest tax planning tools available to you and your beneficiaries.

You will pay the LOWEST TAX by taking advantage of double tax treaties (called tax optimisation).

What do people living in the UK know that offshore salesmen ignore? ... and Why?

You are likely to damage you and your beneficiaries' future if advised to transfer pensions overseas by salesmen with limited tax knowledge.

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