

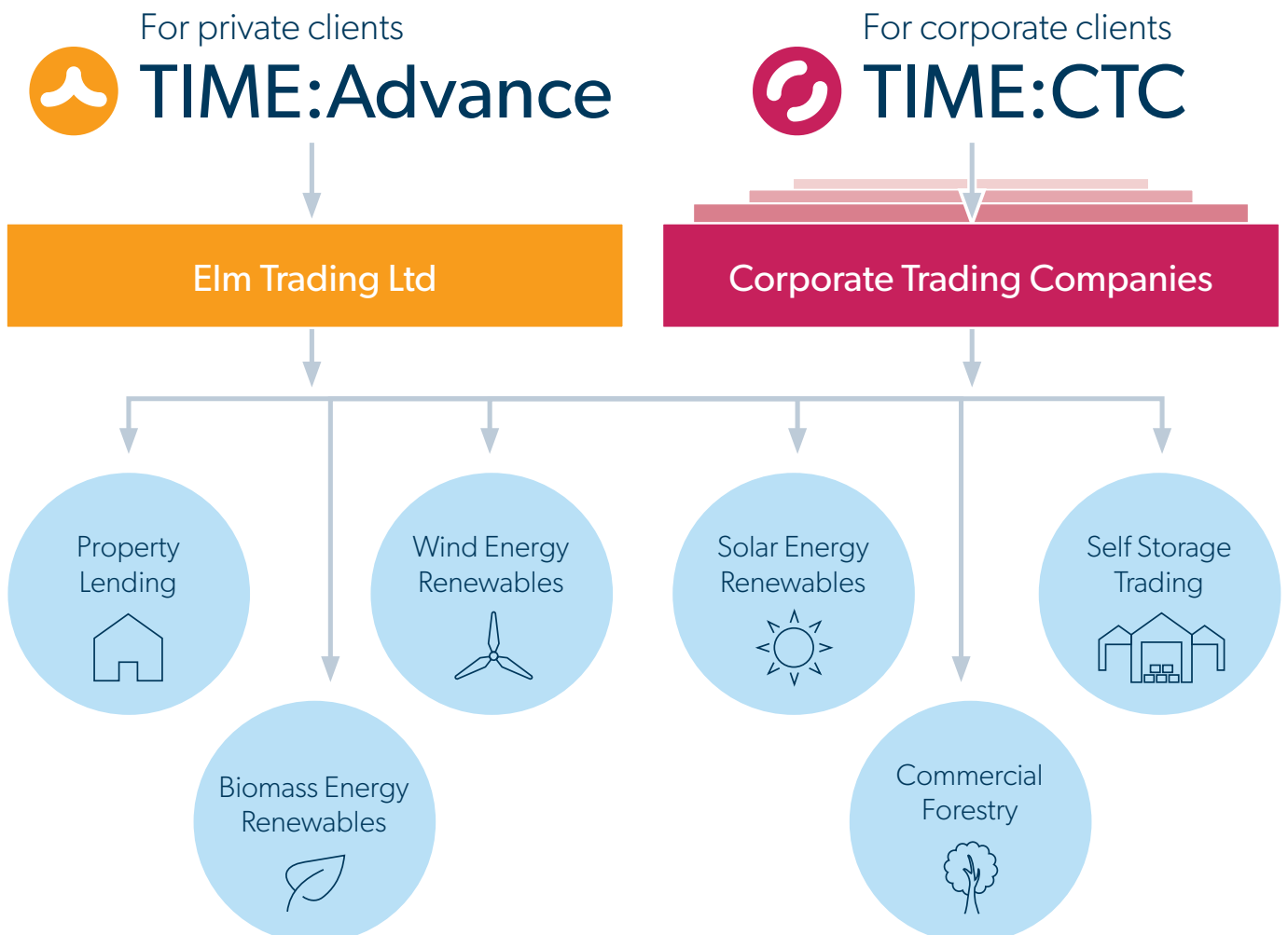
OUR CAPITAL PRESERVATION FOCUSED IHT SERVICES



TIME is an award winning provider of tax efficient investment solutions with our original Inheritance Tax (IHT) service boasting a 21 year track record of successfully achieving IHT savings for our investors. We currently manage over £250 million of Business Property Relief (BPR) assets - around a third of our funds under management. Over 1,000 of our investors have already successfully achieved BPR, a 100% success rate.

We pride ourselves on offering real transparency around our products, what we invest in and what the risks are. Above all we always keep our clients at the forefront of our mind and their best interests at heart. With a nationwide distribution team of 25, we are dedicated to supporting the adviser community.

Structure of TIME:Advance and TIME:CTC



TIME'S CHARGES



BPR service for private clients

TIME:Advance is a discretionary management service that allows investors to access BPR to mitigate their IHT liabilities. The service targets a net return of 3.5% p.a. with a capital preservation focus achieved through investing in asset backed businesses.

Fees

Deferred AMC	0.75% + VAT Only taken from excess performance over target of 3.5%
Initial Charge	2.5%
Dealing Fee	1%
Minimum investment	£25,000
Minimum top up	£10,000



(Corporate Trading Companies)

BPR service for corporate clients

TIME:CTC is designed to help businesses utilise or reinstate existing BPR, allowing them to potentially remove their IHT liabilities. The service targets a net return of 3.5% p.a., investing into the same trades as TIME:Advance.

Fees

Deferred AMC	1% + VAT Only taken from excess performance over target of 3.5%
Initial Charge	3.5% + VAT (where applicable)
Exit Fee	1% + VAT
Minimum investment	£100,000
Minimum top up	£25,000

Differentiation

- Longest track record of any provider
- Highest scoring Allenbridge reviews
- Winner of Best BPR Manager 2015
- Independent advisory committee formed of industry experts
- Partial fee rebate in the event of death within two years for clients in TIME:Advance
- Exceptional customer service
- Transparent investment philosophy
- Focus on capital preservation
- Team of 10 planning experts based around the UK, with a further 15 in our London office ready to support you and your clients

If you would like to find out more about any of our investment solutions, please contact us on

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🌐 time-investments.com



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