

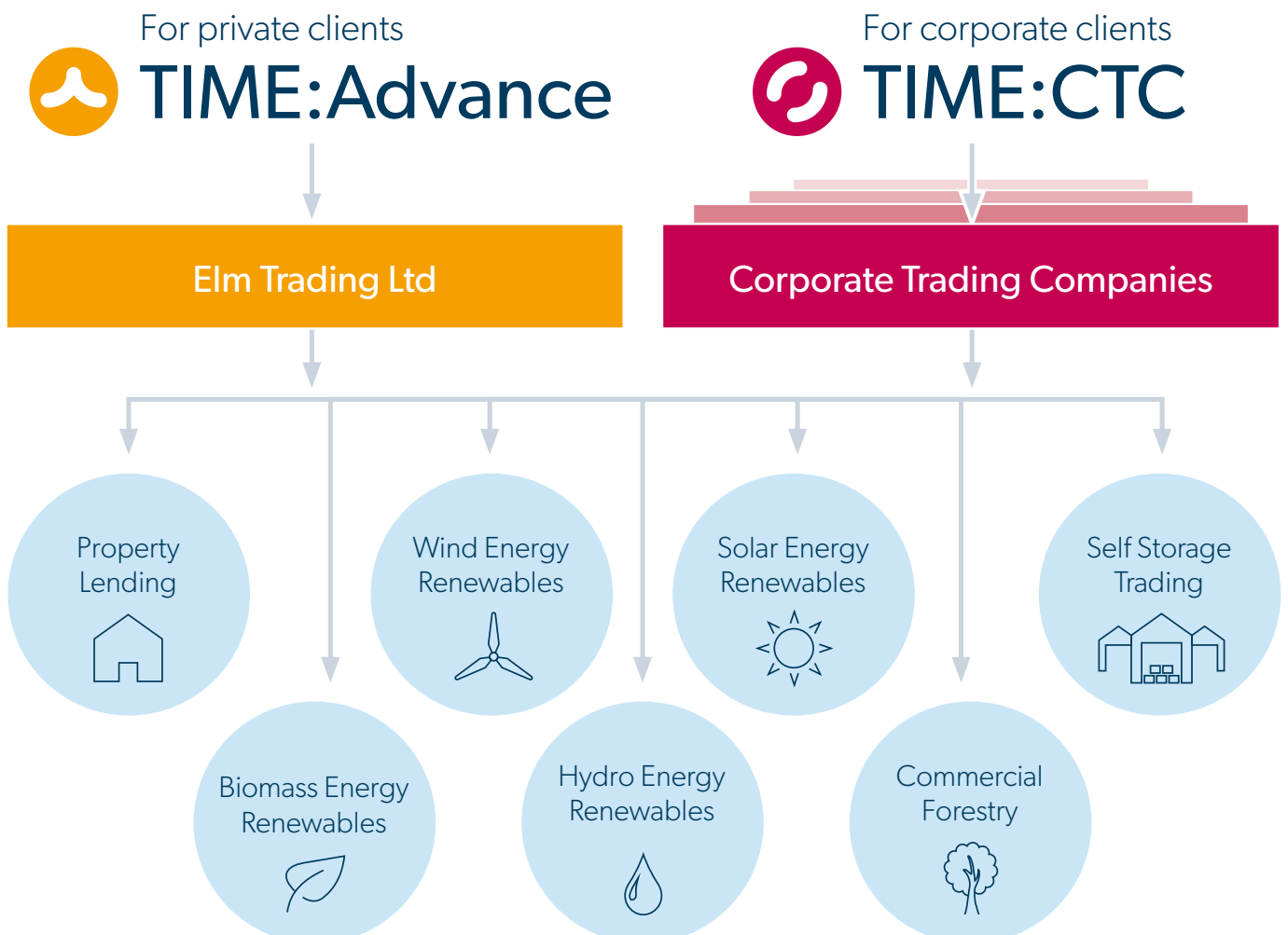
OUR CAPITAL PRESERVATION FOCUSED IHT SERVICES



TIME is an award winning provider of tax efficient investment solutions with our original Inheritance Tax (IHT) service boasting a 22 year track record of successfully achieving IHT savings for our investors. We currently manage over £355 million of Business Relief assets – around a third of our funds under management. More than 1,000 of our investors have exited and achieved Business Relief (BR).

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 30, we are dedicated to supporting the adviser community.

Structure of TIME:Advance and TIME:CTC



TIME'S CHARGES



BR service for private clients

TIME:Advance is a discretionary management service that allows investors to access BR 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)

BR service for corporate clients

TIME:CTC is designed to help businesses utilise or reinstate existing BR, 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
- Winner of Best IHT Portfolio Service 2017/18
- Highest scoring Allenbridge reviews
- Winner of Best BPR Manager 2015
- Independent advisory committee formed of industry experts
- Focus on capital preservation
- Partial fee rebate in the event of death within two years for clients in TIME:Advance
- Exceptional customer service
- Transparent investment philosophy
- Team of 12 planning experts based around the UK, with a further 18 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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