



MVAM

MOLE VALLEY
ASSET MANAGEMENT

AIM INHERITANCE TAX PORTFOLIO



WHO?

Mole Valley Asset Management offers innovative and bespoke investment services to private clients and intermediaries.

WHAT?

AIM is the London Stock Exchange's International market for smaller growing companies.

The majority of these companies qualify for Business Relief (BR). This relief means that if investors hold these shares for a minimum of two years their investments will be exempt from Inheritance Tax. To take advantage of this we have launched a dedicated Inheritance Tax saving investment product for private investors.

Under current UK legislation this may reduce individuals' Inheritance Tax by up to 40% of invested funds.

Our AIM IHT Portfolio will invest in twenty AIM listed stocks. The Portfolio itself will be closed to new investment once the total amount invested has reached £25m.

WHY?

Retain your wealth

Investments are exempt from Inheritance Tax, if shares held for 2 years or more.

Go for an ISA

Doubly attractive tax structure: tax-free ISA status during life, which is free of IHT on death.

Rewarding risk

Portfolio of 20 AIM shares, focused on strong, profitable companies, with a successful track record, valued at between £100m-£1bn, picked by our in-house investment team.

Retain access

If you need to get your money out, no problem - we just sell the shares and send you the money

KEY BENEFITS

- Invest in good quality companies
- Consistent, repeatable strategy
- Clear reporting
- Money back usually within a week of receiving a redemption request

FAIR FEES

- No charge for advice
- No entry fees or exit fees
- Annual management charge of 1.25% including VAT
- Dealing and admin fees will be charged

WARNING

The value of your investments and the income from them may go down as well as up. Existing IHT legislation may change to the detriment of your investment. There is no guarantee that individual companies on AIM will continue to qualify for Business Relief and, thereby, exemption for IHT. Eligibility is determined by HMRC at the point it is claimed.

OUR PORTFOLIO FAMILY

- AIM Inheritance Tax Portfolio (IHT)
- Bespoke Investment Portfolios (BIPs)
- Fixed Income Portfolio (FIP)
- Make the World Better Portfolio (MTWB)
- Premium Dividend Portfolio (PDP)
- Rain or Shine Portfolio (RoSP)
- Yorkshire T20 Portfolio (YT20)

SAVING THROUGH

- Pensions
- Corporate Pension Schemes
- General Investments Accounts (GIA)
- ISAs

WARNING

The value of your investment in this portfolio and the income from it may go down as well as up, and you may not get back what you invested.

ABOUT US

Mole Valley Asset Management offers innovative and bespoke investment services to private clients and intermediaries.

A highly experienced team investing clients' savings directly into the markets aided by proprietary screening and original research.

A dedicated investor portal app.

Personalised reports issued monthly.

We always remember, 'It's your money'.

GET IN TOUCH TODAY

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Mole Valley Asset Management Ltd (MVAM), registered in England (Company no. 08600041) is authorised and regulated by the Financial Conduct Authority (registration no. 613008).