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Wealth Strategies



Welcome to the first Wealth Strategies e shot. This is a bi-monthly newsletter designed to give you an insight into the services offered by the Wealth Strategies team.

In addition, we will focus on a variety of financial and tax related issues that individuals face, whilst keeping you updated on any Budget changes or HM Revenue & Customs announcements.

If you would like to find out more about the Wealth Strategies team, please visit our [website](#) or contact any member of the team.

Welcome to WealthPlanning™

WealthPlanning™ is our bespoke solution for high net worth individuals, trusts and families with existing wealth. The WealthPlanning™ process involves us spending time understanding our clients' vision and helping them build a strategy to fulfil their goals. Financial planning, tax advice and robust investment solutions are all integral parts of the process and by bringing these three elements together we are able to deliver effective strategies.



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Emergency Budget

Recapping the Emergency Budget

George Osborne's first Budget had been subject to much speculation and when it was delivered it contained a number of messages – the UK is open for business, the coalition Government is committed to reducing the Budget deficit and hard decisions will have to be made.

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Does your fund manager have the X factor?

We would all like to think our investments are doing well compared to the market and it is human nature to believe that we can beat the market (or identify someone who can) through intelligence, insight and hard work. This belief is constantly reinforced by the City and most of the mainstream media.



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Capital gains tax – recent changes

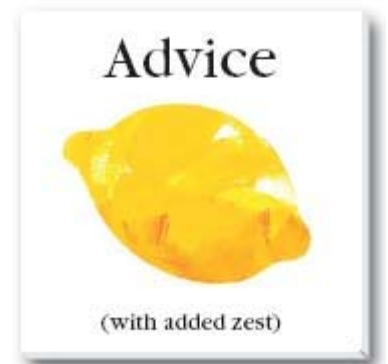
When the first Budget of the new coalition Government was delivered, the announcement of a change to the Capital Gains Tax (CGT) rate was not unexpected. However the timing and level of increase did surprise some.

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More pension changes in the pipeline

Many will be pleased to see the end of the complex rules surrounding pension tax relief put in place by the Budget of April 2009. That Budget announced the intention to restrict tax relief on pension contributions made by high earners to the basic rate from April 2011.

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Comprehensive Spending Review

George Osborne announced the results of the coalition Government's Comprehensive Spending Review on 20th October. The programme of spending cuts has been put together with the aim of reducing the budget deficit, and preserving the UK's gold plated AAA credit rating.

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Inheritance tax

Inheritance tax (IHT) has existed in different guises for several centuries now and came to be known as IHT in 1986. In 2007/08, the net cash receipts from IHT were £3.8 billion but this dropped to £2.8 billion in 2008/09*.

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Award-winning

Proud news to relay from within our own team - Rachel Kitching, who is a senior paraplanner in our Leicester office, has been presented with the Highest Achiever award in the Diploma in Financial Planning by the Personal Finance Society. In addition, she has won the award for Best Performance in completing the Diploma in Financial Planning from the Insurance Institute of Leicester. Well done Rachel – this is a truly outstanding achievement.

Looking to...

Pre-Budget Report

The Treasury has confirmed that they will be scrapping the Pre-Budget Report in favour of economic and fiscal statements and the first of these will be released on 29 November.

Contemplating...

More cost savings for the Government

It has been announced that HM Revenue and Customs (HMRC) plan to stop sending tax agents copies of some correspondence that is issued to clients. For example, agents will no longer receive copies of PAYE coding notices that have been issued to clients. The estimated cost saving of this measure is £1.25 million. Taxpayers should, therefore, make sure that all correspondence from HMRC is forwarded to their tax adviser in order to ensure their tax affairs are in order.

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