

# COOPER - PARRY Wealth Strategies



***Welcome to the second 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.*

## Beginning the WealthPlanning™ Process

Our last newsletter gave you a taste of what WealthPlanning™ is all about. Hopefully you liked what you heard, and you'd like to find out more. So, when you pick up the phone to us, what can you expect from the early stages of our process? [>> READ MORE](#)



## Goodbye to 2010 and all that

Over the festive season you may have noticed that some financial journalists turned their attention to writing articles on predictions for 2011. This is what some in the trade call their 'year enders'.

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## Maximise your charitable donations

Registered charities have the ability to reclaim the basic rate tax paid on a donation providing the donor has made the necessary declaration and the donor has paid sufficient tax. In addition, higher rate and additional rate taxpayers are able to claim tax relief on their donations at their marginal rates. [>> READ MORE](#)



## Ireland: lessons for investors (...one, two, three)

Reaching understanding on the right way to invest often starts with studying bad investment decisions. But the lessons are far less painful when they are built on others' experiences.

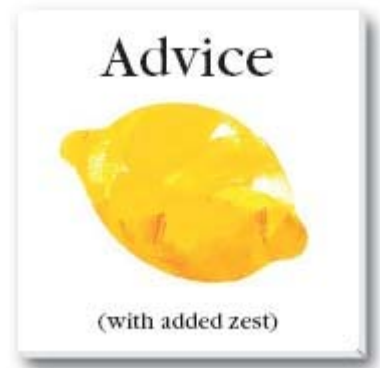
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## 75 not out!

At a time when cricket references are met with much better humour than usual, the Government has published the draft legislation to back up all those changes to pensions they announced in the emergency budget.

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## Where there is a will, there is a way

Wills are an important tax planning tool that should not be overlooked. By making a will you are able to ensure that your assets go to those who you wish to receive them.

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## Important Dates

2009/10 tax returns must be submitted to HM Revenue & Customs by 31 January 2011. In addition, balancing tax payments for 2009/10 and first payments on account for 2010/11 must also be made by this date.  
2011 Budget – the date has been set for Wednesday 23 March 2011.



## New Wealth Strategies Team Members

We are delighted to welcome **Beverley Lavin** and **Peter Brewill** to the team

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