

Your **Company** Logo

EIS Tax Relief Report

for

Example Client

Created by Your Name

Your Company

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Introduction

The following report displays your EIS investments and calculates how much tax relief you could be entitled to receive. Note that we have assumed in future years, your income and tax paid is sufficient to enable the full tax relief to be claimed for the ongoing investments. All figures are displayed in today's terms.

Overview

Forecasts included:

- £200k EIS claim £60k tax relief and defer some CGT

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Forecast: Â£200k EIS claim Â£60k tax relief and defer some CGT

Original investment:	£200,000.
Assumed net investment return:	3.00%.
Estimated years to disinvest EIS:	4.
After investment period:	Keep funds invested.



EIS Tax Relief Chart for Example Client



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Year by year breakdown - Â£200k EIS claim Â£60k tax relief and defer some CGT

Year	Cost Before Tax Relief	Tax Relief Claimed	Cost After Tax Relief	Growth
2015	£200,000	£60,000	£140,000	£200,000.00
2016	£200,000	£60,000	£140,000	£206,000.00
2017	£200,000	£60,000	£140,000	£212,180.00
2018	£200,000	£60,000	£140,000	£218,545.40
2019	£200,000	£60,000	£140,000	£225,101.76
2020	£200,000	£60,000	£140,000	£231,854.81
2021	£200,000	£60,000	£140,000	£238,810.45
2022	£200,000	£60,000	£140,000	£245,974.76
2023	£200,000	£60,000	£140,000	£253,354.00
2024	£200,000	£60,000	£140,000	£260,954.62
2025	£200,000	£60,000	£140,000	£268,783.26
2026	£200,000	£60,000	£140,000	£276,846.76
2027	£200,000	£60,000	£140,000	£285,152.16
2028	£200,000	£60,000	£140,000	£293,706.72
2029	£200,000	£60,000	£140,000	£302,517.92
2030	£200,000	£60,000	£140,000	£311,593.46
2031	£200,000	£60,000	£140,000	£320,941.26
2032	£200,000	£60,000	£140,000	£330,569.50
2033	£200,000	£60,000	£140,000	£340,486.59
2034	£200,000	£60,000	£140,000	£350,701.19

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Tax breakdown - £200k EIS claim £60k tax relief and defer some CGT

Capital Gain to defer:	£200,000.
Capital Gain Tax deferred:	£56,000 (28% tax rate).
Potential inheritance Tax saved after 2 years: (BPR qualifying)	£80,000.