

Your **Company** Logo

VCT Tax Relief Report

for

**Example Client**

Created by Your Name

Your Company

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## Introduction

The following report displays your VCT 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:

- Teachers and State Pension - make non tax payer for life

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## Forecast: Teachers and State Pension - make non tax payer for life

Investment in Year 1: £9,000 and reinvested every 5 years.

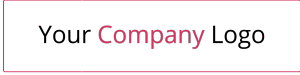
Investment in Year 2: £9,000 and reinvested every 5 years.

Investment in Year 3: £9,000 and reinvested every 5 years.

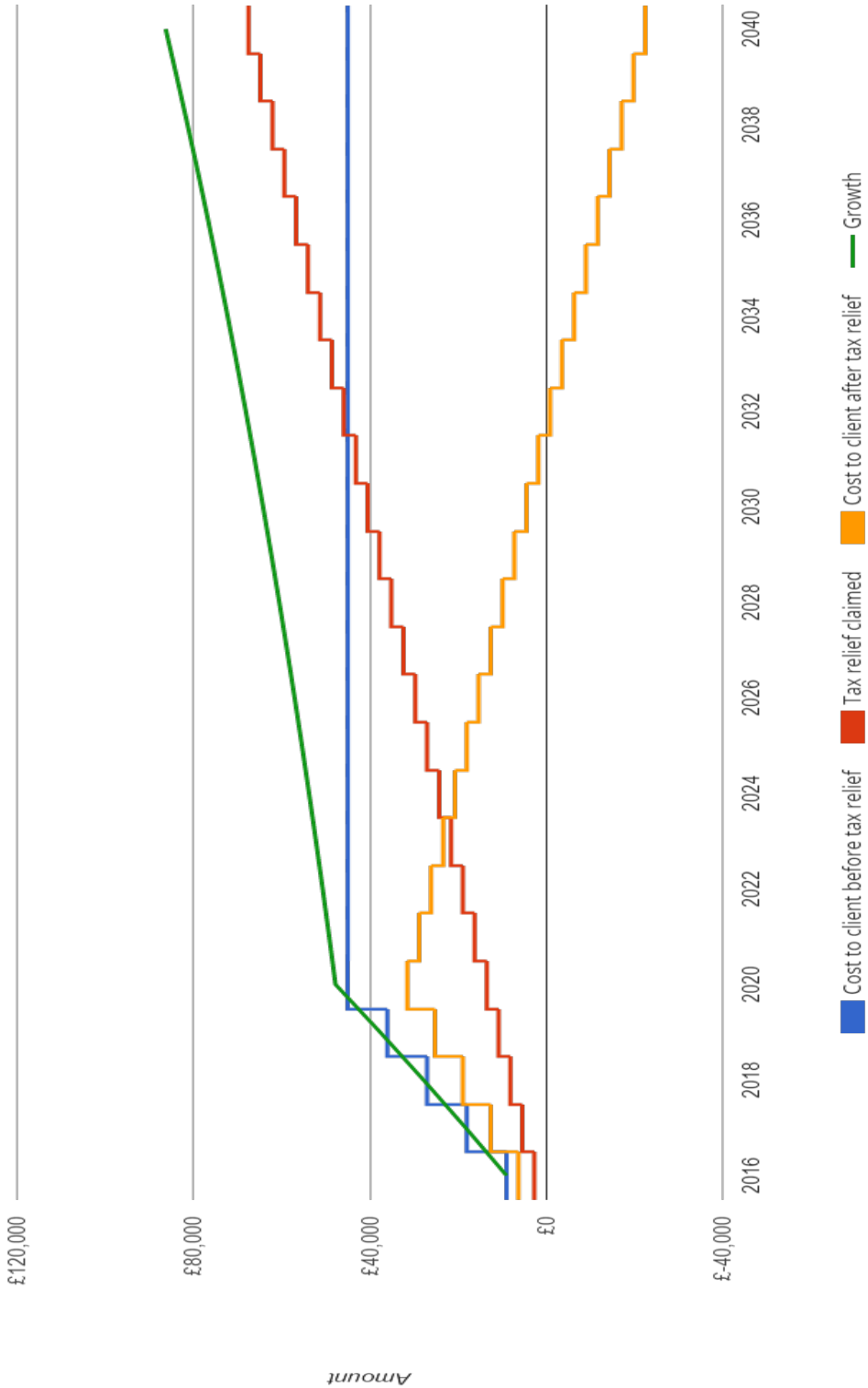
Investment in Year 4: £9,000 and reinvested every 5 years.

Investment in Year 5: £9,000 and reinvested every 5 years.

Assumed net investment return: 3%.



VCT Tax Relief Chart for Example Client



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## Year by year breakdown - Teachers and State Pension - make non tax payer for life

Year	Cost Before Tax Relief	Tax Relief Claimed	Cost After Tax Relief	Growth
2016	£9,000	£2,700	£6,300	£9,000.00
2017	£18,000	£5,400	£12,600	£18,270.00
2018	£27,000	£8,100	£18,900	£27,818.10
2019	£36,000	£10,800	£25,200	£37,652.64
2020	£45,000	£13,500	£31,500	£47,782.22
2021	£45,000	£16,200	£28,800	£49,215.69
2022	£45,000	£18,900	£26,100	£50,692.16
2023	£45,000	£21,600	£23,400	£52,212.92
2024	£45,000	£24,300	£20,700	£53,779.31
2025	£45,000	£27,000	£18,000	£55,392.69
2026	£45,000	£29,700	£15,300	£57,054.47
2027	£45,000	£32,400	£12,600	£58,766.10
2028	£45,000	£35,100	£9,900	£60,529.08
2029	£45,000	£37,800	£7,200	£62,344.95
2030	£45,000	£40,500	£4,500	£64,215.30
2031	£45,000	£43,200	£1,800	£66,141.76
2032	£45,000	£45,900	£-900	£68,126.01
2033	£45,000	£48,600	£-3,600	£70,169.79
2034	£45,000	£51,300	£-6,300	£72,274.88
2035	£45,000	£54,000	£-9,000	£74,443.13
2036	£45,000	£56,700	£-11,700	£76,676.42
2037	£45,000	£59,400	£-14,400	£78,976.71
2038	£45,000	£62,100	£-17,100	£81,346.01
2039	£45,000	£64,800	£-19,800	£83,786.39
2040	£45,000	£67,500	£-22,500	£86,299.98