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CashCalc can help solve growing IHT concerns.

A recent survey* has identified a lack of Inheritance Tax knowledge amongst wealthy Brits and highlighted the important role financial advisers must play in educating potential clients.

But how are financial advisers able to help educate clients about the merits of IHT Planning, provide an effective IHT Planning service, and help clients legitimately avoid leaving a substantial tax bill for their families?

The IHT Calculator by CashCalc has been specifically designed to help and assist financial advisers meet such demands. It takes into account all necessary complex tax calculations and even considers;

- Married, single, widowed, and un-married clients.
- Changing asset values, including mortgages, loans and equity release.
- Planning for first death and second death, and outstanding liabilities from first death.
- Residential Nil Rate Band Allowance and tapered Residential Nil Rate Band Allowance (after £2 million).
- Before advice situation and after advice situation.

Company Director and in-house Chartered Financial Planner, Ray Adams, said “The level of information this calculator can provide both advisers and clients is unrivalled – it certainly is the only tool on the market capable of conducting comprehensive IHT planning”.

For more information regarding the IHT Calculator by CashCalc please visit www.cashcalc.co.uk or contact CashCalc direct on 01633 851808.

** Information found via Canada Life website. Survey of 1,001 UK consumers aged 45 or over with total assets exceeding the individual IHT threshold (nil-rate band) of £325,000. Carried out in September 2016. Research conducted by Atomik.*

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For further information, please contact:

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Notes to editor

CashCalc was developed by a team of Chartered Financial Planners from South Wales.

Since its launch in May 2014, CashCalc has developed a suite of over 20 financial planning tools and accumulated over 4,500 financial advisers.