MONTGOMERY
ESTATE PLANNING

OUR PROFESSIONAL SERVICES

Investments
Choosing the most appropriate investment solutions including ISAs, JISAs, General Investment Accounts, Offshore and Onshore Bonds, VCTs, EIS and Business Relief Schemes

Family Protection
Protecting those we love in the event of ill health or death

Estate Planning
Using investments, pensions, and life insurance for reducing and providing for Inheritance Tax liabilities

Sustainable Investments
Choosing investments that consider the environment, social factors and how organisations are governed

Bloodline Protection
Keeping wealth within the family and passing assets to future generations

Trusts
Creating lasting legacies for loved ones and potentially reducing Inheritance Tax

Retirement Planning
Planning for retirement using Personal Pensions, SIPPs, Annuities and cashflow modelling for future income needs

Tax Planning
Understanding potential tax liabilities and how to reduce them where possible

Charitable Trusts
Building in Philanthropic, tax efficient gifting, that can impact future generations

Later Life Planning
To support loved ones needing longer term care

Wills
Making sure that your wishes are carried out by those you trust and assets pass to the right people using straight forward or more complex planning as is necessary

Lasting Powers of Attorney
Choosing those who you want to act for you in financial and health matters if you were unable to act for yourself

LEGACY
PROTECTION