Mail Finance

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SKIPTON BUILDING SOCIETY

FINANCIAL OBJECTIVES TOOL

Your Report

The information contained in this report is based on what you have told us and you should treat the information in this summary as a guide only.



The consequences of leaving behind a 40% inheritance tax bill could be significant – but by taking actions now you can reduce or even eliminate this potential burden on your family.

There are a number of options available for tackling an inheritance tax bill - although the sooner you start to make plans, the more choices there will be. For example, some potential solutions require you to survive for at least seven years in order to be fully effective. Others would be more costly to implement, the longer you wait.



I DON'T WANT MY FAMILY TO WORRY ABOUT MY FINANCES



Call 0800 121 4269