



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

## Calculate future liability

Now that you have calculated the value of your estate and your current Inheritance Tax bill, it's important to think about your potential future liability. Complete the details below, to find out how the main residence nil rate band, which will be introduced in April 2017 may impact your liability.

Increase in estate per annum:

[Calculate](#)

## Your future liability

Tax Year

Main residence value

Main residence nil rate band

Remaining estate

Nil rate band

IHT liability

2030/2031
2035/2036
2040/2041
2045/2046

Tax Year	Main residence value	Main residence nil rate band	Remaining estate	Nil rate band	IHT liability
2020/2021					
2021/2022					
2022/2023					
2023/2024					
2024/2025					
2025/2026					
2030/2031					
2035/2036					
2040/2041					
2045/2046					

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