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octopus investments

A brighter way

Planning opportunities in your client bank

Our investments can help clients in a range of situations meet their financial goals and make use of available tax reliefs. This document outlines some potential planning ideas you might want to consider.

Clients who want to plan for inheritance tax but want to retain access to capital	Clients who need a fast inheritance tax solution	Clients with a power of attorney in place and who want to plan for inheritance tax	Clients who plan to sell or have sold their business in the last three years	Clients with large ISA portfolios who want to plan for inheritance tax
Clients who have inherited a spouse's ISA	Clients looking to settle assets into trust and maintain their nil-rate band	Clients with a significant income tax liability	Clients likely to exceed the lifetime pension allowance or restricted by the pension annual allowance	Clients looking to reduce their income tax bill using their ISA
Landlords interested in investing rental income for retirement	Business owners who want to extract profits tax efficiently	Experienced investors who want to diversify and target significant capital growth	Clients who have realised a capital gain	Companies with excess cash on the balance sheet

Do you have a client in mind?

To discuss any of these opportunities in more detail, get in touch with your local Octopus Business Development Manager on 0800 316 2067.

Tax-efficient investments are not suitable for everyone and put investor capital at risk. The value of an investment, and any income from it, can fall as well as rise. Investors may not get back the full amount they invest.

Any recommendation should be based on a holistic review of your client's financial situation, objectives and needs. We do not offer investment or tax advice. Issued by Octopus Investments Limited, which is authorised and regulated by the Financial Conduct Authority. Registered office: 33 Holborn, London EC1N 2HT. Registered in England and Wales No. 03942880. Issued: November 2020. CAM010389-2011