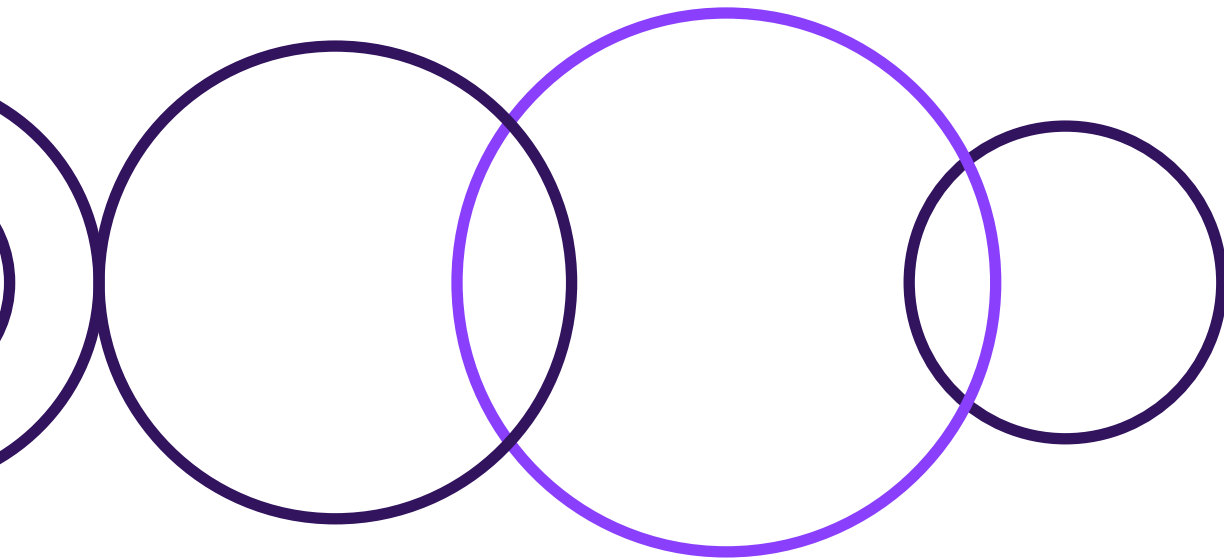


**Client Planning
Scenarios**

**Seed Enterprise Investment
Scheme (SEIS)**

Investment Carry Back

(reduce previous tax year income tax liability)



Targeting tax free
growth whilst reducing
income tax liability

Tax benefits (CGT free
growth and/or Loss
Relief) can be applied
to individual portfolio
companies

SEIS investments
qualify for Business
Relief after 2 years
allowing for Inheritance
Tax (IHT) planning

For illustrative purposes only. This example assumes no loss or gain on any of the investments, and no account is made for initial or ongoing fees and charges. Investors should read the relevant Investment Memorandum brochure before deciding to invest.

Investment Carry Back

(reduce previous tax year income tax liability)

SEIS

50%

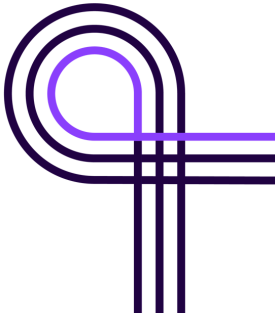
Income Tax Relief
CGT Reinvestment Relief
CGT Disposal Relief
IHT Planning
Loss Relief

For high-earning individuals, reducing income tax liability while benefiting from tax-free capital growth is a key financial goal. One effective strategy involves investing in the Seed Enterprise Investment Scheme (SEIS) using a portfolio approach, which allows investors to claim significant income tax relief on their investment. This strategy not only reduces current and previous years' tax liabilities but also offers potential additional tax benefits such as capital gains tax reinvestment relief.

	Previous Tax Year	Current Tax Year
Income Tax	£30,000	£30,000
SEIS Investment	£0	£120,000
Income Tax Relief	£30,000	£30,000
Adjusted Income Tax	£0	£0

In this scenario a £120,000 SEIS investment would allow for up to £60,000 income tax relief enabling a client to minimise 2 tax years

Notes:
Benefits of tax-efficient investments, including SEIS, are subject to change based on tax rules and personal circumstances.
SEIS investments are not suitable for everyone. Any recommendation should be based on a holistic review of your client's financial situation, objectives and needs. This communication does not constitute advice on investment, taxation or any other matters.
Investors must hold SEIS shares for at least three years to benefit from tax relief. Selling before this period could negate any tax advantages.



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