



Titan Alternatives partnership with
Triple Point Estate Planning Service

Unlocking the Potential of Business Relief Solutions

June 2025

Don't invest unless you're prepared to lose all the money
you invest. This is a high-risk investment.

[Take 2 minutes to learn more](#)

This document is solely intended for FCA regulated financial advisers in the Titan Wealth affiliated network.

Triple Point Investment Management LLP has approved this financial promotion for the purposes of s21 of the Financial Services and Markets Act 2000 solely in relation to the Triple Point Estate Planning Service for the distribution need of the Titan Group Companies exclusively.

The changes announced to Inheritance Tax (IHT) in the Autumn 2024 Budget – including making unspent pensions part of a person's taxable estate – are prompting advisers to revisit clients' existing plans and look for more ways to successfully plan for IHT.

We think investments offering IHT-exemption through Business Relief could be a key part of your business. So, as part of our commitment to helping you find innovative solutions for your clients, we held talks with several leading estate planning service providers. Our goal was to find a best-in-class service for you to recommend, to negotiate an attractive discount for clients, and to make sure the application process was as easy as possible. And we found it.

We've secured a new partnership with Triple Point which will offer an attractive initial fee for the Triple Point Estate Planning Service, as well as giving you and your clients access to their dedicated support team.

Who are Triple Point?

Since 2004, Triple Point has built a successful business by creating innovative investment solutions that solve the challenges faced by thousands* of individual investors, as well as institutions of all sizes. It manages assets across five distinct investment strategies: Private Credit, Venture Capital, Clean Heat, Social Housing, and Energy.

* Source: Triple Point, May 2025

What is Business Relief?

Since 1976, Business Relief has been a valuable way for business owners and families to pass down their estate without triggering an IHT bill. An estate can claim IHT relief on shares in a Business Relief-qualifying company or investment service provided the deceased owned the shares for at least two years before their death.

The Autumn 2024 Budget changed the amount of relief that can be claimed on Business Relief-qualifying assets. From April 2026, the first £1 million of shares held in privately owned qualifying companies will be eligible for 100% Business Relief. Any amounts over £1 million will be eligible for 50% relief. Further, from April 2026 qualifying companies listed on the Alternative Investment Market (AIM) will see their rate of Business Relief reduced from 100% to 50%.

The Triple Point advantage

Having worked with Triple Point for over a decade, across various structures, sectors, and mandates, we have experienced first-hand their ability to source, deploy, manage, and exit investments. Most relevant is that their track record in this particular product sector has been running since 2006 and, while past performance is no guarantee of future performance, the Generations and Navigator strategies have both delivered positive quarterly growth since inception.

Key stats (at 30 June 2025)



£1.4 billion: Triple Point's AUM in IHT strategies



100% Success Rate: To date, Triple Point is unaware of any cases where an estate's claim for Business Relief through the Estate Planning Service was unsuccessful.




7 days: Average time taken to exit investments in the Triple Point Estate Planning Service over the last 12 months.



£17.8 million: Investments exited in Q2 2025.

Triple Point Estate Planning Service

The Triple Point Estate Planning Service launched in 2006 and manages £1.4 billion of capital in IHT strategies.* The Service only invests in unquoted companies that participate in the lending and leasing trade, and are eligible for 100% Business Relief (subject to the amount invested).



Take advantage of this unique opportunity to access Business Relief solutions with Titan and Triple Point.

Investment Strategies

The Triple Point Estate Planning Service aims for stable, consistent, and positive investment returns by investing in ways that create value across the UK economy. Investors have access to two strategies, Generations Strategy and Navigator Strategy, and can choose either strategy or a blend of both. Your clients can arrange regular or one-off withdrawals or keep their money invested. Liquidity not guaranteed.



Generations Strategy

Generations targets annual returns of 1.5%-2.5% and invests in one or more companies predominantly providing lending, leasing and infrastructure funding to corporates and the public sector.



Navigator Strategy

Navigator targets annual returns of 4%-5% and invests in one or more companies predominantly providing lending and leasing to SMEs.

Important: Capital at risk. How Triple Point Estate Planning Service has performed in the past may not be repeated and should not be viewed as a guide to future performance. Tax reliefs depend on your personal circumstances, and tax rules can change.

* As at June 2025

Clients who can benefit from BR

Clients with the following characteristics could all benefit from the Triple Point Estate Planning Service:

- Clients with an estate (including unspent pensions) that will exceed available IHT allowances (nil-rate band and residence nil-rate band)
- Clients who can't wait seven years for their estate to achieve IHT exemption
- Clients needing access and control over their wealth in their lifetime
- Clients looking to plan for IHT with a Power of Attorney in place

Triple Point has a range of client planning scenarios covering typical estate planning challenges and showing how clients can include Business Relief-qualifying investments as part of their longer-term financial plans.

Important: Triple Point cannot advise potential investors on their tax position as tax treatment depends on the individual circumstances of each person. Potential investors should seek professional tax advice to understand how Business Relief-qualifying investment can support their long-term financial plans.

For more information about Triple Point please contact a member of the team:

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The content of this document is produced by Triple Point Investment Management LLP, the Alternative Investment Fund Manager ("AIFM") to the Triple Point Estate Planning Service. This document is intended to support the distribution of Triple Point Estate Planning Service solely and exclusively by the FCA authorised firms of the Titan Group Companies permitted to provide investment advice in coordination with Titan Alternatives Limited, an appointed representative of Sturgeon Ventures LLP.

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