

MORFITT & TURNBULL

(Management Services) Limited

Estate Planning

Morfitt & Turnbull (Management Services) Ltd - The History

The Company was founded over 45 years ago, having been originally established in October 1971 as a financial advisory company interacting with other similar standing professionals, i.e. accountants, solicitors and stockbrokers, to offer their clients a professional service, the emphasis being on service!

The personnel have changed but the business model remains the same - prudent financial management, emphasis on service to both the client and the professional, two distinct parts to the business being investments and pensions - with some enhancements along the way.

We have many long-standing clients and professional connections still in place, which reaffirms our belief that we provide a quality service to all.

In this factsheet we consider:

Estate Planning

Estate planning isn't about how much money you have it's about protecting what you have for you, during your lifetime and for those you wish to benefit after you've gone.

It is important to plan ahead to help to mitigate the potential effects of Tax upon your Estate.

We can assist if you need to:

- Make a Will
- Mitigate Inheritance Tax
- Review your Will
- Plan for the effects of Long Term Care

We can use a variety of tools to achieve this such as:

- Life Assurance
- Trusts
- Offshore Tax Structures
- Investment Bonds
- Wills
- Lasting Powers of Attorney

Morfitt & Turnbull (Management Services) Ltd will help you to implement a strategy that suits your situation. It is important to keep your plan updated and events such as:

- Deaths within the family
- Divorce within the family
- Changes in Legislation
- Births within the family
- Disputes within the family

may affect your plan and it is important to find a balance between financial efficiency and asset protection.

Morfitt & Turnbull (Management Services) Ltd have a wealth of experience and expertise to help you with any issues or queries in relation to these matters, as well as an ongoing service that continues to provide you with support in future years.

We will have a close working relationship with your solicitor and/or accountant throughout the process to give you a comprehensive and cohesive approach in finding the right solution for you.

Please contact Gareth Shaw on the number below to arrange an initial meeting.

Morfitt & Turnbull (Management Services) Limited
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