Aim

To share with you the knowledge of qualified solicitors* and investment advisers, and offer practical suggestions and assistance so you can learn from examples of good practice avoiding some of the common pitfalls that we see.

Purpose

By the end of the seminar, delegates should be able to:

- Understand inheritance tax and who it affects
- Understand the various types of wills and will planning available for individuals
- Understand risk and holistic investment planning utilising asset allocation
- Review the effectiveness of your own arrangements in the light of this new information

Format

Delivered by qualified experts who specialise in inheritance tax planning with an emphasis on working with holistic planning. The experts include solicitors*, independent financial advisers and stockbrokers.

Who should attend?

As a guideline, the seminar will be of most interest to individuals and couples over the age of 50, with total assets (including the value of their home) in excess of £1,000,000 and with savings and investment capital of at least £200,000.

Who are we?

Aisa (Advanced Independent Specialist Advice) is an IFA authorised and regulated by the Financial Services Authority. AisaProfessional have run seminars annually for several years, inviting other professionals (solicitors*, stockbrokers) to present solutions to attendees. We specialise in the use of trusts, investments, property and retirement arrangements with an emphasis on inheritance tax planning.

We offer advanced and sophisticated Wealth Management analysis. Examples will be available at all seminars. James Pearcy-Caldwell, AisaProfessional, is an established author whose articles have appeared in 'Investors Chronicle' and 'What Investment'. He would highlight that property, tax, trusts, wills and cash accounts are not regulated by the FSA.

* Solicitors, where available, will vary from venue to venue.

Outline programme

- Saving tax on property – considering companies
- Overview of inheritance tax
- Investment strategy and holistic planning

Inheritance tax planning including:

- Using trusts and making gifts
- Lifetime planning
- How to make your will work for you

We reserve the right to change the programme detail, presenters, or date if necessary.

"found seminar very interesting, very helpful – thank you very much"
Mr. and Mrs. Gay

Fee

Free

Normal fee of £40 waived

Special Programme

- The impact of budget changes on inheritance tax planning
- Property tax mitigation
- Using a Discretionary service for shares

Please indicate the number of spaces you wish to reserve at your choice of venue

Location	Venue	Date and Start Time	
Norwich	Park Farm Hotel & Leisure Hethersett, Norwich Norfolk, NR9 3DL	**25 September 2007** 9.30am	
Cambridge	Hotel Du Vin 15-19 Trumpington Street, Cambridge, CB2 1QA	**26 September 2007** 9.30am	
London	Investec Asset Management Limited, 2 Gresham Street London, EC2V 7QP	**9 October 2007** 9.30am	
London	Jupiter Unit trust Mnagers 1 Grosvenor Place London, SW1X 7JJ	**11 October 2007** 9.30am	
Brighton	The Old Ship Hotel Brighton Seafront	**12 October 2007** 9.30am	

Further details will be sent upon acceptance

Name (Mr/Mrs/Ms)

Address

Postcode

Telephone no. (home)

Please provide your telephone number, or call us on 0207 993 8742.

Places at our seminars go quickly and we will call you to confirm your reservation.

☐ I would like to be contacted individually to discuss how to use trusts, wills and how to create a financial strategy. Please contact me.