

MP Estate Protection Plan[®]

2nd October 2025

MP Estate Protection Plan[®] for the family of

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Disclaimer:

This report is for informational purposes on estate planning, this does not constitute financial advice.

Your MP Estate Protection Plan[®] Report focuses on possible estate planning strategies aimed at maximizing asset protection.

This report and the calculations therein is based on the rules as they stand today. The Autumn budget of 2024 made changes to certain areas of inheritance tax planning such as business relief and pension due to come into force in April 2026 and April 2027 respectively. Equally, the nil rate bands are due to increase in 2030.

We recommend that you come back to us for updated advice after these milestone dates to revisit the planning opportunities you may have.



Preface

Dear

Thank you for considering MP Estate Planning UK Limited® for your estate and wealth protection needs. We are pleased to introduce you to our MP Estate Protection Plan®, a comprehensive strategy designed to safeguard your assets for future generations, minimize tax liabilities, and provide peace of mind and protection for you and your family now.

The Importance of Estate Planning

Estate planning is not merely about writing a Will. It is a proactive approach to protecting your family's wealth and ensuring that your wishes are carried out in a tax-efficient manner. Without proper planning, a significant portion of your estate may be lost to inheritance tax (IHT), care home fees, and other unforeseen situations. The MP Estate Protection Plan® helps you to avoid these pitfalls by ensuring that your assets are structured in the most efficient and protected way to pass down to your loved ones.

TAX RELIEF frozen until 2030

BE ADVISED: In the three years between 2027 and 2030, 80% of pension holders will have a frozen TAX RELIEF and your pension pot will be part of your IHT calculations. If possible, eat more broccoli and do not die within these three years.

Anti-Forestalling Legislation

First introduced in FA 1971, the UK's anti-forestalling legislation aims to prevent individuals from accelerating transactions or financial actions to avoid higher tax rates or new tax rules, especially in estate planning and pensions.

Pre-emptive actions to minimise taxes may incur penalties or fail altogether. Professional advice helps ensure strategies remain within legal bounds while safeguarding wealth.

Attempting to avoid taxes improperly can backfire, increasing tax burdens or incurring significant penalties.





Key Benefits of the MP Estate Protection Plan®

1 Tax Efficiency and IHT Mitigation

One of the primary benefits of our estate protection plan is its ability to help mitigate or even eliminate the impact of IHT. With the current rate set at 40%, a substantial portion of your estate could be lost to IHT if the right measures are not in place. Our experienced team works with you to create strategies that maximize the use of allowances and exemptions, ensuring that more of your wealth stays within your family.

2 Protection from Care Fees

Without proper planning, care fees can significantly deplete your estate, leaving little behind for your loved ones. Our plan can help to protect your assets from the high costs of long-term care, allowing you to pass on the wealth you've worked hard to build. By using trusts and other estate planning tools, we can try to ensure that your estate remains intact, regardless of your care needs in the future.

The two keys to this are that you are not setting up a trust solely to avoid care fees, there must be other legitimate concerns that you are protecting against - divorcing children being a good example - and you establish the planning sufficiently far in advance of care that there is no foreseeable need for care or support as per the Care Act 2014.

3 Tailored to Your Needs

Every family's circumstances are unique, which is why the MP Estate Protection Plan® is fully customizable to meet your specific needs. Whether you wish to provide for children from a previous marriage, protect vulnerable beneficiaries, or simply ensure that your assets are distributed fairly, your plan is tailored to your needs and reflects your individual goals and values.

4 Peace of Mind

Estate planning is not only about preserving wealth; it's about giving peace of mind. Knowing that your affairs are in order and that your loved ones are protected provides invaluable reassurance. Our team of expert planners will work closely with you to simplify what can often seem like a complex process, ensuring that your plan is clear, actionable, and legally robust.

5 Maintaining Control

With the MP Estate Protection Plan®, you maintain control of your assets during your lifetime. We structure your estate so that you can continue to enjoy your wealth while knowing that it is protected for the next generation.

Next Steps

We believe that every family should have the opportunity to protect their wealth and plan for the future. We believe that saving family assets strengthens the country.

At MP Estate Planning UK Limited®, our mission is to ensure that your legacy endures, free from the burden of unnecessary taxes or fees.

We look forward to working with you and helping secure your family's future.

Yours sincerely,

MP Estate Planning UK Limited®



Why not simply GIFT the property to my child?

Giftng is a part of the strategy. Giftng without using a trust is an absolute gift.

This is the consequence of giftng an asset to a person unconditionally - it enters their estate, and they own it 100%.

The downside: this leaves you open to all the usual modern problems. For the avoidance of doubt, absolute gifts are not recommended. Gift assets with the MP Estate Protection Plan®. The MP Estate Protection Plan® can help to defeat all the modern threats.

Modern threats include:

- ✦ GROBs
- ✦ Divorce
- ✦ Bankruptcy
- ✦ Care Fees
- ✦ Avoiding Sideways Disinheritance
- ✦ Bloodline Planning
- ✦ Probate (Time)
- ✦ Probate (Costs)
- ✦ Rise of Contentious Probate
- ✦ Capital Gains Tax (24%)
- ✦ Inheritance Tax (40%)
- ✦ Income Tax



Gift With Reservation Of Benefit (GROB)

Also abbreviated to GWROB or GWR, a Gift with Reservation of Benefit is when you gift an asset yet continue to benefit from the same asset.

For IHT purposes, a gift that is not fully given away because the person making the gift (the donor) keeps back some benefit for himself is brought back into the person's estate when they pass away.

For example, if a donor gives his home to his adult children (who live elsewhere) and continues to live there rent free, this would be a GROB and caught by section 102 of the Finance Act 1986, which charges such gifts to IHT as though they remained in the donor's estate.

Another example, you gift your objet d'art (Monet? Hirst? Banksy?) to your child, but it remains in your home. Did you give it or are you still deriving a benefit from it?

HMRC know all the tricks. Some people think they can 'give' their home to their children and remain in the property. This will not work - unless you pay your children a market rent - not a peppercorn rent - for life.

Giftng - on its own - is not a functional solution for the most people.



Divorce

The divorce rate in the UK is currently 42%. In 1963 it was 19%. This rate has more than doubled in the last 50 years.

Let's presume you gift your property to your son/daughter.

It's a very nice gesture.

Five or ten years on, the child gets divorced. Your future ex-son/daughter-in-law rightly expects to receive their half of the marital assets. Where does this leave you, the original owner?

Unfortunately, we've seen parents forced out of their homes simply for not thinking it through.

We've also seen cases where the future ex-spouse has remained in the relationship until the father/mother-in-law passes away and your child inherits your estate.

Sadly within 30 days of receiving their inheritance, they also receive divorce papers - and half of the estate goes out the door.

Your MP Estate Protection Plan® can stop this from occurring.

42%

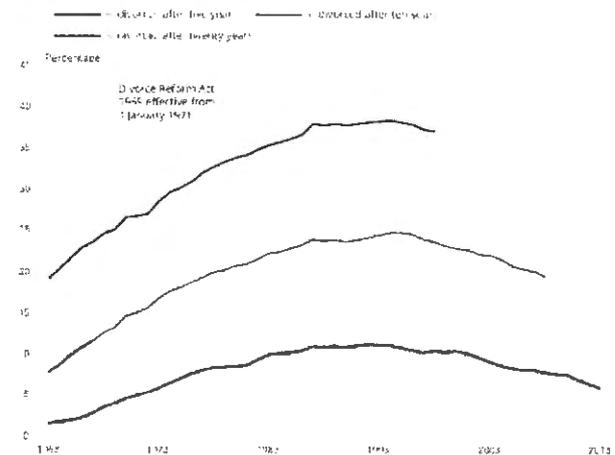
of marriages end in divorce

34%

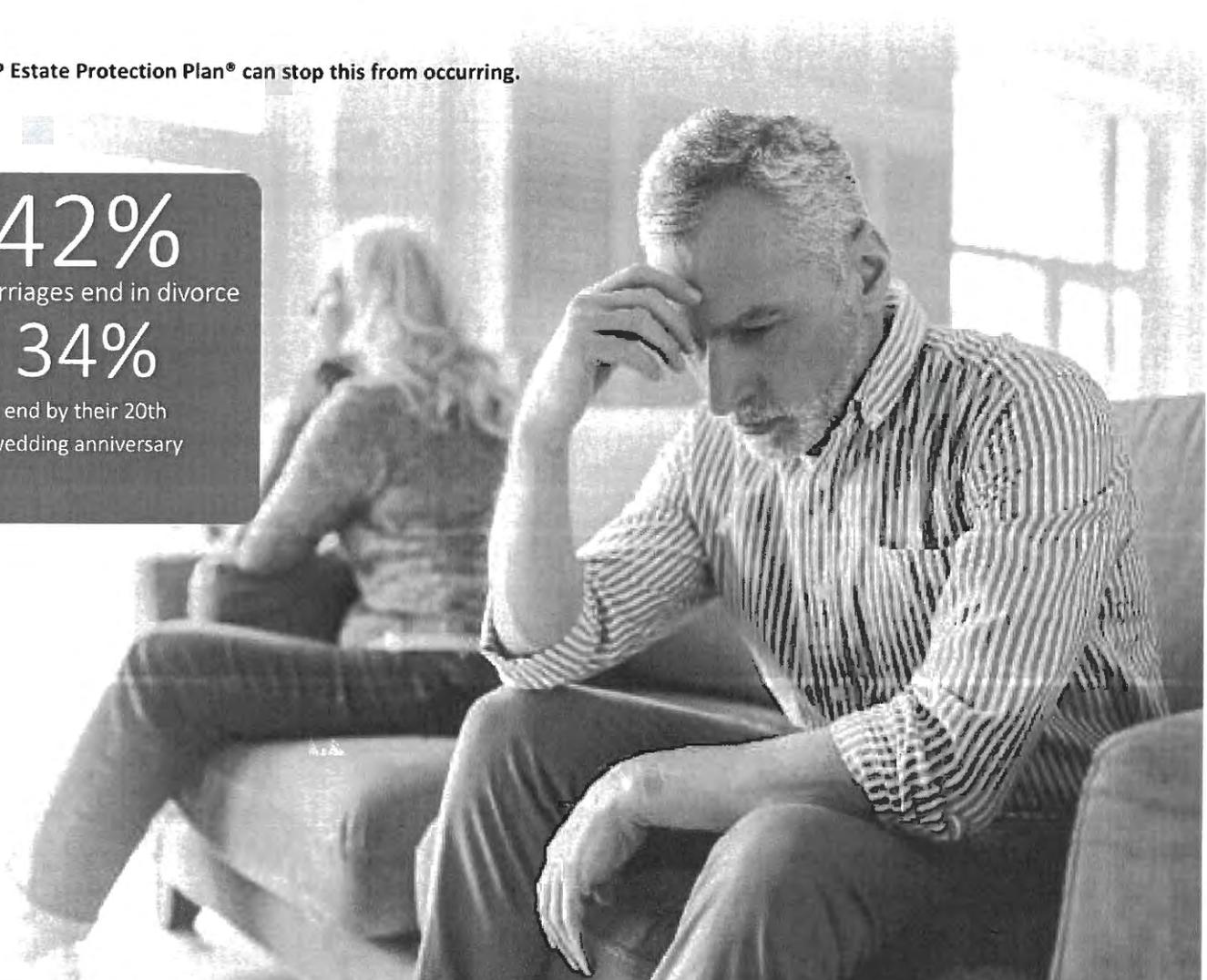
end by their 20th wedding anniversary

Figure 3: The percentage of marriages ending in divorce has been decreasing for those who have married since the mid-1990s

Percentage of marriages ending in divorce by anniversary and year of marriage, England and Wales, 1963 to 2013



Source: Office for National Statistics – Divorces in England and Wales





Bankruptcy

The child has received their inheritance via a Will. Happily, they then go off and start the business they've always wanted. Sadly, it doesn't go as hoped.

The creditors roll up and take every penny they can including your home and property that you gifted to your child absolutely.

This can also happen if the child loses a lawsuit from an accident or misadventure. The creditors will appear and take everything they are legally allowed.

Care Fees

More recently, the Local Authority seeking to recover care fees has become a new form of predation on your largest asset.

With care costs ranging between £1,000 and £2,000 PER WEEK in 2022, this often has a devastating impact on the estate - long before we've died.

In July 2024, with the new Labour Government - one of their first actions was to remove the proposed cap on care fees.

Care Fees are now **UNCAPPED** in the UK.

Good Advice: Set up your MP Estate Protection Plan® years before there is any foreseeable need for care or support.

Avoiding Sideways Disinheritance/Bloodline Planning

With the increased divorce rate, the rise of the blended family was inevitable.

Blended family: two people remarry with children from previous relationships.

A trust can ensure that your estate goes to your selected beneficiaries. Trusts do this while also providing for your partner. The key difference here is that the partner is not the absolute beneficiary - these remain your chosen beneficiaries.

Additionally, conditions can be written into the documents to instruct how the benefit is to be applied or not.

Your MP Estate Protection Plan® is the best way to ensure money sticks to blood. The MP Estate Protection Plan is called 'Bloodline Planning' for that very purpose.

Probate (Time)

Assets that are in Trust (where the legal title has been transferred) do not go through Probate.

Assets in trust are immediately available to the beneficiaries.

Not having to wait a year while grieving is a tremendous comfort.

Probate (costs)

If a professional probate provider is used, they often calculate the cost of probate based on the size and complexity of the estate.

If your largest asset (your home) is not in the estate, but in a trust, then this can have a reductive effect on future probate costs.

And while the MP Estate Protection Plan® costs more than a basic will, this cost is offset by the profound savings the family can realize.





The Rise Of Contentious Probate

The rise of contentious probate in the UK has been a growing trend in recent years. This refers to disputes that arise over the distribution of a deceased person's assets and estate, often leading to legal proceedings.

According to a report by the University of Oxford, there has been a 20% increase in the number of contentious probate cases in the last decade. This can be attributed to a number of factors, including an increase in the number of complex estates, the rise in blended families, and the growing popularity of DIY wills.

The report also highlights the need for better education and support for those who are dealing with probate, to prevent disputes from arising.

The rise of contentious probate in the UK is a concerning trend, and it is important for individuals to seek professional legal advice when making their Estate Plan to avoid any potential disputes.

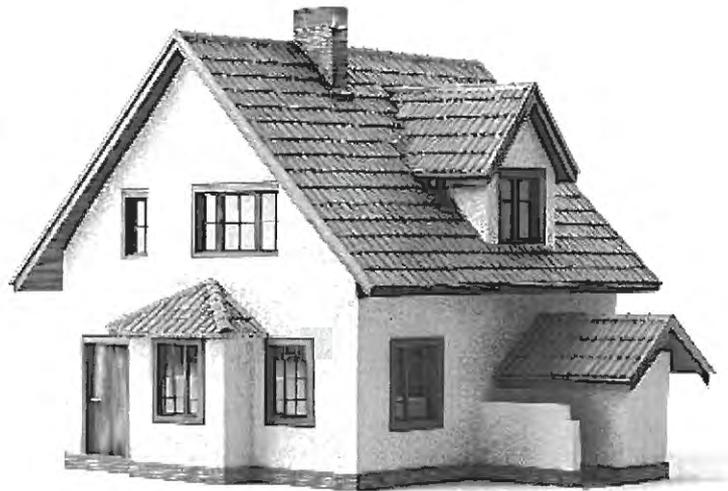
According to the ONS, the national average cost of a contentious probate challenge is £12,774.40.

Capital Gains Tax (24%)

How can I reduce my CGT on my buy-to-let (BTL) properties?
In terms of your principal residence, when you sell your main home (or only home) you don't usually have to pay any capital gains tax (CGT).

We are now discussing a 2nd or 3rd property in which you do not reside.

Once the owner of the second or third property settles the property into their MP Estate Planning Second Property Trust, the CGT can be deferred for up to 125 years.



Here's How To Mitigate CGT:

Gift Hold-Over Relief

When you claim Gift Hold-Over Relief (TCGA 92 s260), you can avoid paying CGT when placing second properties into trust.

Holdover Relief is not automatic. This must be done within 4 years of the gift. It must be filed on the donors' (original owner of the property going into the trust) personal tax returns.

The simplest way to submit this form is to send it along with the self-assessment tax return. This is done on the settlor's self-assessment.



<https://www.gov.uk/gift-holdover-relief>

In summary: You may not pay Capital Gains Tax when you place assets into trust - if you apply for Hold-Over Relief.

Not only will this avoid the immediate payment of CGT; it also has the added benefit of removing the asset from the estate for IHT purposes over 7 years.



Inheritance Tax (40%)

Taper Relief

Most People are confused by taper relief and believe that they must wait the entire 7 years to see any benefit. That's inaccurate. Significant benefits begin after just 36 months.

(Here is an example of a £200,000 IHT bill).

IHT bill	IHT	Taper relief	Savings %	£200,000	
				Tax savings	Tax payable
After Year 1	40%	0%		£0	
After Year 2	40%	0%		£0	
After Year 3	40%	20%	8.00%	£40,000	£160,000
After Year 4	40%	40%	16.00%	£80,000	£120,000
After Year 5	40%	60%	24.00%	£120,000	£80,000
After Year 6	40%	80%	32.00%	£160,000	£40,000
After Year 7	40%	100%	40.00%	£200,000	£0

Inheritance Tax (40%) Reduction On Main Residence

A major problem in inheritance tax (IHT) planning is the family residence.

How can the taxpayer reduce the IHT on the main residence while still living in the home? The answer can be found in your MP Estate Protection Plan® Gifted Property Trust.

Here's how they work:

FA 1986 GPT (4)

Gift of Undivided Land

HMRC give a wide meaning to occupation in the pre-owned assets tax (POAT) provisions in FA 2004 Sch 15. The current precedents are the tests established in the Lady Ingram case (Ingram and Another v. Commissioners of Inland Revenue, 1999). This planning has been effective for more than 25 years - it is tried and tested.

There must be a deed of gift in favour of the donee. The gift will be a potentially exempt transfer (PET) within IHTA 84 s3a.

Undivided Share: The gift should be of a tenancy in common interest.

POAT

Generally, the proposal is within the ambit of POAT, but there is an exclusion in FA 2004 Schedule 15 paragraph 11(5)(c), if the property interest given to the child 'would fail to be treated as property which is subject to a reservation of benefit' but for GPT(4).

Conclusion

This is one of the great IHT reliefs. And can reduce the IHT footprint of the Principal Private Residence (PPR) by 50%.



The FOUR Tests To Qualify For This Planning

1 Does your child live elsewhere and come round more frequently than Easter and Christmas. Perhaps they spend some weekends and some holidays there?

3 Does your child have access to the property and has the keys to come and go as they please or they know the passcode or location of the secret key? Do they have the right and freedom to come and go as they please?

2 Does your child keep some of their personal possessions at the address? Pictures from childhood? An old school uniform? Storage of personal possessions and a right to use with minimal actual occupation can constitute occupation for those purposes.

4 This is an odd precedent: Do they pay or contribute less than 50% of the utilities and maintenance of the property?

No benefit is to be provided at the expense of the donee. Your child must not overpay for their use of the property. Indeed, the safest course is for the original owner to pay all the running costs - council tax bill, gas and electricity, cleaning, TV licence, maintenance - and the capital outlays also.

Long answer short: If you can answer YES to all the above - OR even better - your child is still lives with you and is over 18, the gift of the undivided share in the property to your children will avoid the gift with reservation of benefit (GROB) provisions. This is a proven strategy and can reduce the IHT footprint on a principal residence by 50%.

Income Tax

Most homes do not generate income - therefore there is no income tax issue.

On BTL's and second properties there is often income.

Problem: How to deal with the income from the second properties without triggering a GROB? The answer can be found in your MP Estate Protection Plan® Second Property Trust.

Here's how they work:

The trust can declare the income and pay the 45% income tax - often considered suboptimal.

OR

The income from the second property is MANDATED by the Second Property Trust trustees to the beneficiaries. The beneficiaries of the Second Property Trust on the second property declare all the income on their self-assessment. The income can be spread among the beneficiaries to help keep them below the thresholds.

Trustees will not normally need to complete a tax return for trust income if it is all mandated directly to the beneficiaries.

The beneficiaries can then GIFT the income back to the parents.

!!

This is done via IHTA 1984 s21 and is called a 'Gift of Surplus Income'



Gift of Surplus Income

The beneficiaries, after declaring the income on their self-assessment, may then choose of their own free will to gift the income to anyone they choose.

'Section 21(1) Inheritance Tax Act 1984 allows an individual to make Inheritance Tax exempt gifts provided the gifts can be characterised as being: part of the donor's normal expenditure; made out of the donor's income, taking one year with another.' In other words: A Gift of Surplus Income.

If there is any hint that there is a written arrangement in place, the planning will potentially fall foul of the associated operations provisions (IHTA 1984 s268). The surplus income must be a GIFT and a voluntary gift. Even better would be for the beneficiary to purchase something on behalf of the giftee: a holiday for example, new white goods etc.

Does The Trust Need To File An Income Tax Return?

Short Answer: No. Where there is NO income, there is no income tax return required.

Here's How...

Interest in possession trusts (IIP)

Trustees

Trustees will not normally need to complete a tax return for trust income if it is all mandated directly to the beneficiaries.

If the trustees have paid basic rate tax after deduction of trust expenses, they will need to complete a Trust and Estate Tax Return (SA900). They will also need to provide the beneficiaries with a statement of the trust income paid to them together with tax deducted. This is known as form R185 (Trust Income).

As with discretionary trusts the trustees must complete the capital gains supplementary pages (SA 905) where there is a disposal or deemed disposal of chargeable assets.

Where trustees appoint assets out of trust to a beneficiary, this would be a disposal for CGT and may incur a tax liability. There may also be a disposal for CGT where the beneficiary of a contingent trust takes an absolute interest.

From 6 April 2023 this was required where:

- ✦ disposal proceeds are more than £50,000 (disposals before 6 April 2023, is £49,200, four times the annual CGT exemption for individuals), or
- ✦ the total chargeable gains (before the deduction of any losses) are more than the trust annual exempt amount, or
- ✦ they want to claim an allowable loss or make any other capital gains claim or election for the year.

Capital gains tax holdover relief may be available for certain transfers in to, or out of an IIP trust. Claims for holdover relief can be made using form HS295. Holdover relief must normally be claimed jointly by the donor and the donee. However, where holdover relief applies on a gift into trust then only the donor needs to claim.



Beneficiaries

Beneficiaries of an IIP trust must report trust income in their self-assessment tax return (SA100). The beneficiaries enter their trust income on the supplementary pages for trusts (SA107).

Tip: Mandating all income direct to the life tenant means that tax returns may only be required where there are CGT and/or IHT implications. However, it will mean that trustees cannot deduct any trust income expenses.

Do I need to file Income Tax returns on these Trusts?

The answer is 'no' when all the income is mandated out.



https://techzone.abrdn.com/public/iht-est-plan/Practical-guide-trustee-report#anchor_8

The Goal

as a DUAL TAX RELIEF of £650,000.00 = **ZERO IHT**

Goal: Reduce the Estate to BELOW £1,000,000.00 to eliminate IHT.





Recommendations

Inheritance Tax liability on second death is presently

-£2,040,000

Family Home Protection Trust PLUS (FHPT+)

Good Planning for Estates GREATER THAN NRB

- ★ Tax Efficient Wills (Kessler 15th Edition)
- ★ 2 x Family Home Protection Trusts Plus
- ★ Retention RNRB for:
- ★ £350,000.00
- ★ Retaining a Tax Savings of up to:
- ★ £140,000.00

Pro's

- ★ CARE FEES Protection for 100% of Home
- ★ Care Fees Protection less than 1 Mth of Care
- ★ Retains your MAXIMUM TAX RELIEFS
- ★ Protect against future Divorce in the family
- ★ Protection against future Bankruptcy
- ★ Defence against Litigation
- ★ Stops HMRC from Generational IHT
- ★ Guardianship for Minor Children
- ★ Eliminates Family Contention

Con's

- ★ May Not Eliminate Entire Tax Bill

Guidance

- ★ Smart Family Plan
- ★ £5,340.00 inc VAT, plus £335.00 disbursement fee (no VAT charged)
- ★ Future Thinking Done Right

Pre Strategy 1 IHT bill:

-£2,040,000



Recommendation 1

Gifted Property Trust (GPT) Good Solution for Taxes and Care

- ✦ Don't Pay Voluntary Tax
- ✦ Gifted Property Trust
- ✦ Recipient Trust (FHPT+)
- ✦ Legal Tax Planning Savings of:
- ✦ £800,000.00

Pro's

- ✦ CARE FEES Protection for 100% of Home
- ✦ SIGNIFICANT TAX SAVINGS
- ✦ Tax Savings BEGIN in 36 months
- ✦ Stops child's future EX-Spouse
- ✦ Protection against future Bankruptcy
- ✦ Strong Defence against Litigation
- ✦ Completely Avoid Family Contention
- ✦ Stops HMRC from Generational IHT

Con's

- ✦ Need +18 year old recipient

Guidance

- ✦ Made Smarter with Tax Savings
- ✦ £2,670.00 inc VAT
- ✦ MAXIMUM Future Proofing

Post Strategy 1 IHT bill:

-£1,240,000



Recommendation 2

Second Property Trust (SPT) Best for 1-3 BTLs or Money Only Trust

- ✦ Second Property Trust 1
- ✦ Second Property Trust 2
- ✦ Legal Tax Planning Savings of:
- ✦ £260,000.00

Pro's

- ✦ SIGNIFICANT TAX SAVINGS
- ✦ Protects BTL's from Care Fees Assessment
- ✦ Outside of Divorce Financial Settlement
- ✦ TAX SAVINGS Start in 36 months
- ✦ Impregnable against future Creditors
- ✦ Strong Defence against Litigation
- ✦ Eliminates Family Contention
- ✦ Stops HMRC's Future Tax Grab

Con's

- ✦ Need +18 year old recipient

Guidance

- ✦ Best Tax and Care Solution for BTL's
- ✦ £6,075.00 inc VAT, plus £335.00 disbursement fee (no VAT charged)
- ✦ Any Family +18 as Giftee?

Post Strategy 2 IHT bill:

-£980,000

Cash and Investments

While a Trust can hold cash and investments, as you have over £50,000 in Cash and Investments, we recommend you speak with an FCA regulated Financial Advisor (IFA).

Why?

A good IFA can help to reduce your IHT liability through specific financial investments and products - none of which we offer. If you do not have an IFA, we can introduce you to good IFA upon commencement.



Leasehold vs. Freehold Property

When placing property into trust, it's important to understand whether the property is freehold or leasehold, as this affects the process.

A freehold property is owned outright, which makes it straightforward and efficient to place into trust, if not mortgaged or subject to another restriction such as a management company.

A leasehold property is owned for a set number of years under a lease granted by a freeholder (landlord), and that lease may contain conditions or restrictions about how the property can be dealt with. If your property is leasehold, we recommend that you check with your freeholder to confirm whether there are any restrictions on placing your interest into a trust.

This does not prevent you from creating a trust, but without the freeholder's consent, it may not be possible to notify HM Land Registry of the trust's existence.

Most freeholders are reasonable and will typically grant consent without issue, but it's important to be aware of and respect any conditions they've set out. As your estate planners, we highlight this as a normal and responsible step in ensuring your arrangements are fully compliant and effective.



What will your MP Estate Protection Plan® include?

Draft Tax Efficient Wills (Kessler 15th Edition) to align with the objectives.

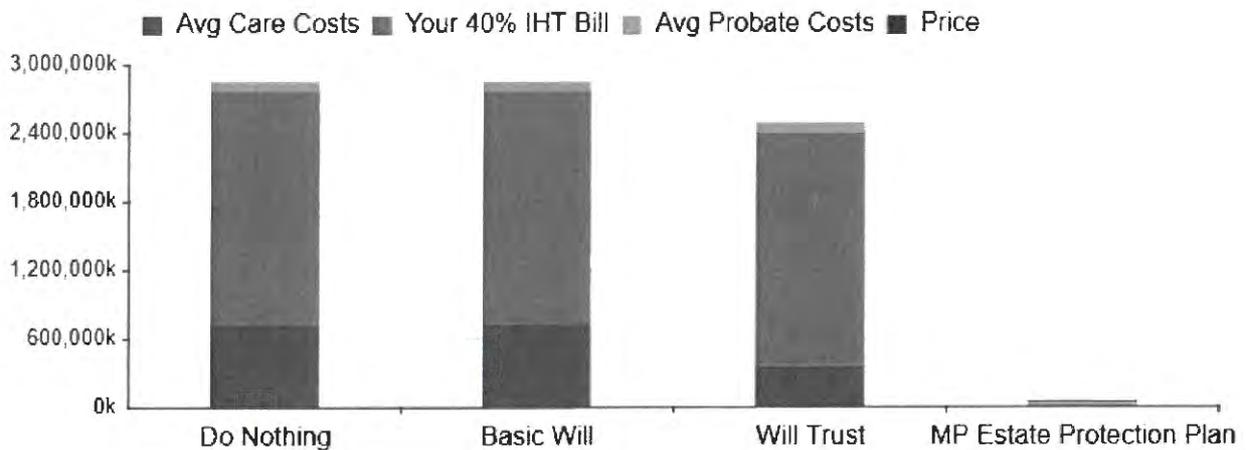
Draw Up and Implement 4 Lasting Powers of Attorney

Trust Strategy #1:

Settle a Family Home Protection Trust (FHPT/FHPT+) with a gift of a portion of the Personal Private Residence (PPR) to the kids.

We never recommend gifting large assets absolutely - always use a Trust for a gift of this value.

Trust Strategy #2: Second Property Trusts





Clear Next Steps:

This report reviews the present situation and gives accurate recommendations based on the information presented. Upon instruction and completion, we are confident that we can ensure "all assets pass to my children as pain free as possible" and we reduce the IHT liability by c£1,060,000.00.

Anticipated Tax Savings:

After 3 years: **£212,000**
 Over the first 7 years: **£1,060,000**

Savings

Life Insurance Savings (Immediate): **£0**
Inheritance Tax (40%) Savings: **-£1,060,000**

	IHT	Taper Relief	Savings %	Tax Savings	Tax Payable
12 Months	40%	0%		£0	
24 Months	40%	0%		£0	
36 Months	40%	20%	8.00%	£212,000	-£848,000
48 Months	40%	40%	16.00%	£424,000	-£636,000
60 Months	40%	60%	24.00%	£636,000	-£424,000
72 Months	40%	80%	32.00%	£848,000	-£212,000
84 Months	40%	100%	40.00%	£1,060,000	£0

Time Cost:

Our process can take less than 7 days, once draft documents have been approved.

Once the documents are attested, they are in effect.

The registration with HMLR can take an additional 10 - 12 months, barring any unforeseen complications.

If this is a first registration on the HMLR systems - there is an additional charge and can take up to two years to complete.

However, once the Trust documents are properly attested, the planning will be in effect. HMLR delays does not undermine the legality of the planning.

Legal Requirements:

In order to proceed, we will require copy ID documents from the settlor(s) and trustees. These are for the Anti-Money Laundering checks. Your National Insurance number along with images of your driver's license, and passport are preferred.

Bad Idea?

Are you against protecting your assets for the future?

Very few people know that in England and Wales Trusts have been used by the wealthy for over 800 years. There's one reason: They work.

Estate Planning is the one thing we can do now - that has a material impact on the family.

Would it be a bad idea to invest in planning that can save **£1,060,000** for your family?

This is the benefit of planning that can return 71.8 times the cost!

Would the family be upset with the savings?



Further Reading/ Viewing:

Here is the link to the Guardian article on the Grosvenor estates:



<https://www.theguardian.com/money/2016/aug/11/inheritance-tax-why-the-new-duke-of-westminster-will-not-pay-billions>



New Duke of Westminster inherits £9bn fortune aged 25

“The benefits of trusts are that they don’t form part of somebody’s estate,” says Ian Dyall, a manager at the financial adviser Towry. “In a discretionary trust, you have a whole pick list of potential beneficiaries which the trustees can choose to appoint benefits to. Because of that, you can’t point a finger to any potential beneficiary and say that’s your money. Money can stay in the trust and cascade down from generation to generation and nobody pays inheritance tax on it.”

We've produced +450 videos that turn complex into easy.

Most are 15 - 60 seconds long and focus on answering one question.

They seem to help as over 100,000,000 people have watched and commented!

We encourage you to have a look and if we have not answered your question, please let us know - we'd like to turn that into a video.



<https://www.youtube.com/@MPEstatePlanningUK>



<https://www.tiktok.com/@mpestateplanninguk>



<https://www.instagram.com/mpestateplanninguk/>



<https://www.facebook.com/mpestateplanninguk>

How To Proceed:

To proceed, please sign our Terms of Business, make payment, and provide copies of ID's.

Our paralegal team will be in contact to go through any data requirements if anything has been missed by your legal adviser.

Once the draft documents have been approved by you, we will get everything sent to you by courier. The entire process can take less than a week.

Do you love your family enough to invest in them today?

Is it a bad idea to plan for a successful family future?



The Family

MP Estate Protection Plan®

Priorities:

Tell me about the situation you are looking to solve. What are we solving? What is the problem?

IHT, Care Fees, Divorce, Bankruptcy, Litigation, Capital Gains Tax, Contention, Sideways Disinheritance, Probate, Kids Financial Mismanagement

Any other relevant information:

Mr I attended one of Mike's webinars and is very interested in securing his £4m house from IHT.

He also has a £1.1m BTL with a company loan of £320k producing £55k pa rental income. He has 2 children in university 20-19. There is around £800k jointly in cash ISA's and stocks. £170k cash in the bank 2. a £1m Mrs £1m. There are 2 life ins' Mr £2m Mrs £700k

How many children do you have?

2

Are any children or Giftees over 18 years?

YES

What solutions did you discover through your research?

What happens if something unexpected occurs, and there's no Trust/Estate Plan in place - how would that affect your family?

What has stopped you from getting this solved already?

Why is this important?

Why is (previous statement) important?

On a scale of 1-10, how important is the solution to you?