

AIM for Inheritance Tax portfolios now available on 4 leading IFA platforms

Submitted by: Fundamental Asset Management Ltd

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Investing in AIM quoted companies for IHT planning purposes has proved to be a highly successful investment proposition over the past few years. The availability of Fundamental's AIM portfolios on a growing number of leading platforms means greater accessibility

Fundamental Asset Management, a specialist investment house, has been successfully managing AIM portfolios, principally for Inheritance Tax ('IHT') planning purposes, for over 11 years. During this time Fundamental's AIM portfolios have significantly outperformed all leading UK stock market indices with the firm's standard AIM portfolios having risen 109% over the 5 years to end March 2016. Fundamental AIM portfolios availability on several platforms has seen growing numbers of IFAs allocate funds to this high performing asset class.

- Platform availability

Fundamental portfolios are now available on the following investment platforms:

Transact

Elevate

Nucleus

Jarvis Securities

Investing in qualifying AIM quoted companies for the purpose of potential inheritance tax mitigation is an effective, proven and non-contentious tax planning method that avoids the costs associated with forming a trust, or the risks associated with gifts. Assets also remain under the control of the holder and are not outside the estate. The short 2 year qualification period make it a compelling tax planning tool but the recent capital growth experienced also means that it has proved highly attractive from an investment perspective as well.

Up until recently the lack of platform availability for AIM portfolios meant many IFAs were often reluctant to recommend this attractive investment proposition to clients. The ability of AIM portfolios 'on platform' changes all this, ensuring ease of administration and reporting.

Fundamental's AIM portfolios invest predominantly in the shares of larger AIM quoted companies with market capitalisations typically greater than £50m, although there are exceptions.

Christopher Boxall, Director of Fundamental, explains,

"It's been a great time to invest in UK based businesses that one can more easily understand and the added IHT planning attractions make them a compelling investment proposition. With Fundamental portfolios now available across a growing number of platforms we have seen a terrific response from IFAs who also appreciate the transparency of AIM investing. With Axa's Elevate soon to be part of the larger Standard

Life it could open up AIM platform availability further.”

Some of the key attractions of the Fundamental AIM IHT planning portfolio service are:-

- Excellent investment performance to date.
- Simple, transparent investment strategy.
- IHT relief on the amount invested, after a qualifying 2 year period (if held on the date of death)

- Instant access to capital should your circumstances change
- No complex trust arrangements that tie up your capital.
- Very competitive charging structure.
- Low cost trading commissions.

Boxall adds,

“With a bewildering array of collective investment funds and structured products promoted to clients, adopting a vast number of differing strategies, many clients haven’t a clue what they are actually investing in. Clients are telling us how delighted they are to once again actually appreciate what they are holding. In the case of AIM, this largely means some terrific UK based businesses whose activities they can understand and often relate to.”

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Notes to Editors

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