

FOR INVESTMENT PROFESSIONALS ONLY

Client looking for growth within a SIPP

Case Study

Mark is in his early 40s and in good health. He is self-employed and pays himself a good salary. He intends to retire at 65 and saves into a SIPP every month. Mark's risk tolerance is high and he is looking for something to add an element of capital growth into his portfolio of investments held in his SIPP on platform. He's not concerned about inheritance tax planning due to his age but he would like to see the full portfolio of what he is invested in as he lost out after holding the Woodford UK Equity fund.

FACT!

AIM is one of the most successful growth markets in the world and can be held by clients as part of their SIPP on platform.

Solution

Mark could invest into a Fundamental AIM Portfolio which has benefitted from the exceptional growth opportunity AIM has had to offer over the last 10 years. This portfolio can be held in a SIPP on platform and each position which makes up the investment is visible due to its portfolio structure. As the portfolio is held within a SIPP it will not qualify for business relief however this is not a concern for Mark given his young age.



The Importance of IHT Planning



Financial Adviser Contact:



Derek McLay
Business Development Manager
07743725659
dmclay@fundamentalasset.com

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