



# Inheritance Tax

Case Study

**LANOP**  
Business & Tax Advisors

# Preserving Family Wealth

Proactive inheritance planning is essential to ensure **effective asset transfer** and maintain financial stability for families, protecting their wealth across generations.





# Client Overview

A retired couple owned two UK properties and held substantial savings. They wanted to ensure their assets could be passed on to their children in the most efficient and tax-effective way, while still maintaining access to their income during retirement.

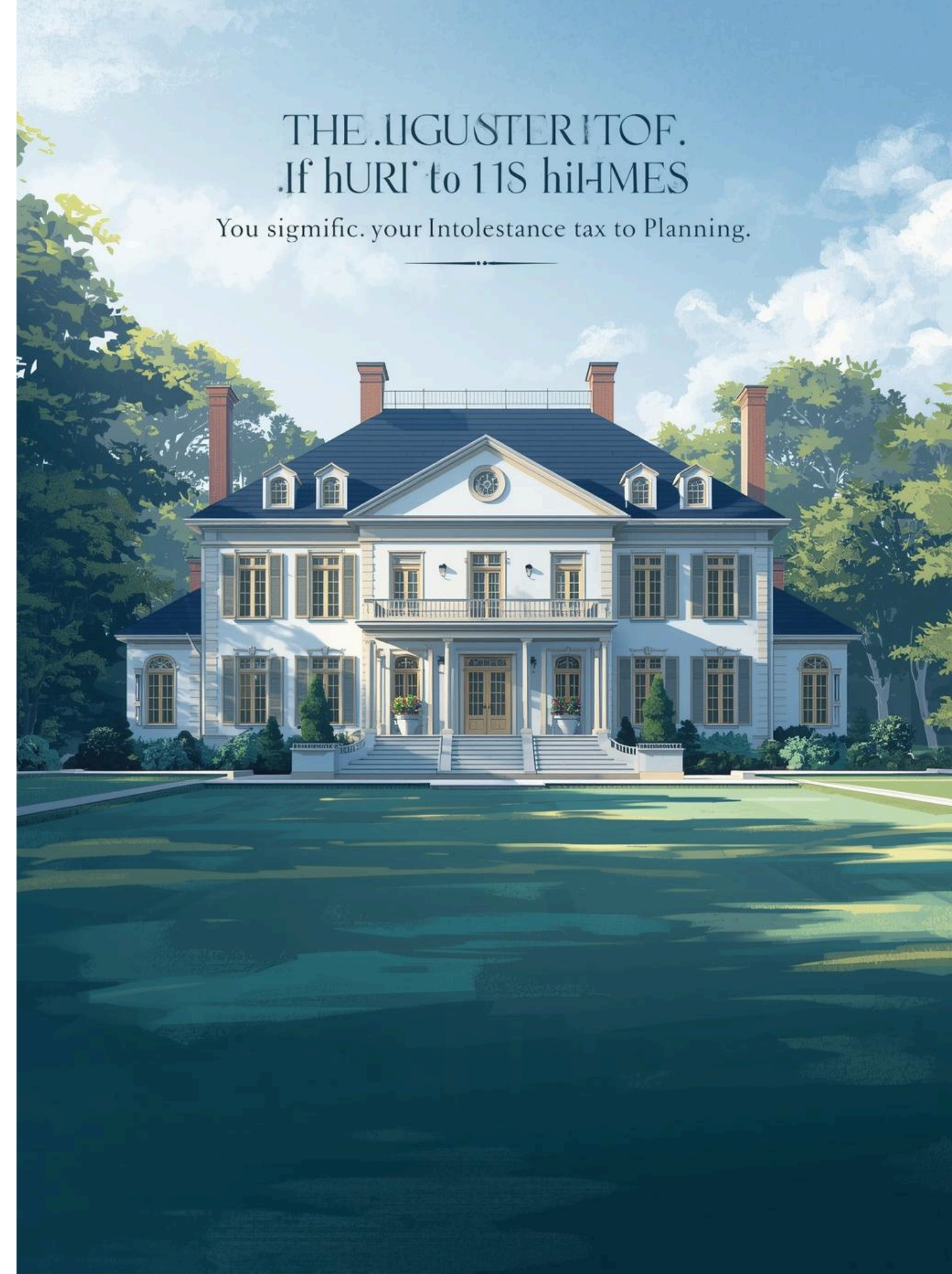




# £500,000

## Projected inheritance tax liability

This significant liability underscores the **importance of strategic planning** to minimize tax exposure while ensuring smooth asset transitions for future generations.



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# Our Solution

## ESTATE REVIEW

We conducted a comprehensive **estate review**, identifying key assets and liabilities to ensure an effective inheritance tax strategy that aligns with the client's financial goals.

## GIFT ALLOWANCE

Leveraging the annual **gift allowance**, we structured gifts to family members to reduce the taxable estate efficiently while ensuring the clients retained access to their retirement income.

## DISCRETIONARY TRUST

Establishing a **discretionary trust** enabled the clients to maintain control over asset distribution, ensuring compliance with legal requirements while maximizing tax relief and protecting family wealth.



# Results Achieved

Our tailored strategies significantly **reduced inheritance tax exposure** while ensuring compliance with regulations, empowering our clients to secure their family wealth for future generations.

Results Achieved



“Lanop gave us peace of mind. We know our children will inherit smoothly and tax-efficiently.”

CLIENT QUOTE






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Book a Free Meeting



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