

beinspired...

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Discussion Document Not for
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EIS opportunity for Business Owners who supplement their annual income with dividends

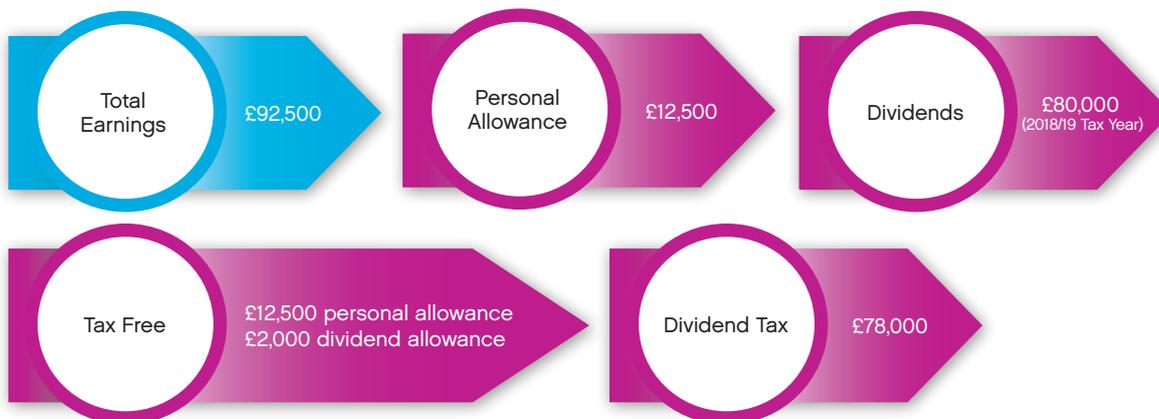
Important Notice

Please read the following information carefully as a professional adviser.

The information contained in this sales aid is for discussion purposes only for professional advisers and their clients, it is not for Retail Clients. The example provided in this sales aid is for illustrative purposes only and should not be relied on when taking or advising on any investment decision.

If you have clients who as business owners are taking money out of their business and are subject to tax on the dividends an annual EIS investment can be an annual subscription to reduce the dividend tax payable. The example below illustrates the calculations which support this approach.

A business owner has a total earnings of £92,500 which breakdowns as follows:



Continued overleaf



VENTURES
Kuber
Opening the door to EIS investment

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If you were to consider an EIS investment:



NB This only works under £100,000 as anything over £100,000 will start to impact the business owner's access to his/her personal allowance of £12,500

Important Notice

EIS/SEIS/BPR Funds are not suitable for all investors as the underlying investments are often illiquid and therefore high risk. Investors may not receive back some or all of the initial investment. Advice should always be sought from a professional adviser prior to investing.

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