Making financial planning easier

Corporate account where family member ownership is 100% accessing superior cash and term deposit rates

Unused allowance reports and Bed & functionality

Using specimen trust and beneficiary forms

PORTFOLIOS	Miggins Ltd	Mrs Miggins	Mr & Mrs (Joint GIA)	Mr Miggins	Trust	Child 1	Grandchild 1	LISA, JISA and junior pension
WRAPPERS	GIA – remainder	GIA – IHT planning	ISA – university fees	GIA – school fees	Section 32 Pension	Personal Pension	Offshore Bond	In-house, well priced, usage up post CGT change
INVESTMENTS	DIM Growth	AIM DIM	Template Cautious	Adviser directed	DIM Growth	Transact–BlackRock Growth 60	DIM Balanced	
FEATURES USED	XS income tax reporting on offshore funds by Transact	DIM uses Peer Review functionality	Multi buy/sell to upload trades from own system	Investor authorisation to approve trades	Section 32 assets fully on platform	Adviser easily blends tax and tax free income	GIA fee payment optimises withdrawals	

All portfolios access family linked pricing

Sub wrappers enable goals-based planning

M338 Version (3) September 2025

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