

A SUDDEN WINDFALL

— WHAT TO DO WITH SOME UNEXPECTED EXTRA MONEY

Although windfalls may be unexpected, if and when they happen, how do you make sure you make the most of them? And, when it comes to inheritance, how do you know if there are any special obligations or considerations that apply?

COMMON QUESTIONS TO CONSIDER

Some questions you may wish to consider include:

- What are my options?
- Do I have to pay tax on an item I inherit?
- I inherited a house and I want to sell it. Do I have to pay Capital Gains Tax?

HOW WE CAN HELP

If you have a sudden windfall like cash, property, shares or even a valuable item there may be financial implications. We can help you understand those implications and help you make the most of your windfall. We'll also ensure you're aware of any tax implications of your decisions.

We can:

- Review and help you set goals and a realistic timeframe.
- Identify your options if the windfall is cash and advise of tax considerations if the windfall is not cash.
- Recommend a selection of investment options.
- Advise you when you need to see an accountant or solicitor.

WHAT TO DO NEXT

If you want us to help you make the most of that windfall contact us today.