

Private Assets Liberation Plan



“transform your current passive estate value into active income value by putting your current private assets to work as business assets”

Release the value
of your private
assets

Private Assets Liberation Plan - Value Brief

This Solution is ideal if you have a significant private estate, comprising non-business assets such as:

- Quoted shares
- Loan Notes
- Property Portfolio

The defining characteristic of all of these assets is that they provide merely passive value. Except for actual income returns, they do not interact with the market to produce any active value. And this is precisely why they are not business assets.

But for you to hold wealth in this form will diminish its value, because the tax system is biased against passive asset holdings, penalising their owners, especially upon death.

Transform your Passive Estate Value into Active Business Value

The Estate Assets Liberation Plan will transform your current passive estate value into active income value by putting your current private assets to work as business assets. This market interaction turns your formerly passive assets into working capital in a business, thus liberating the value of those assets in a way that the tax system actively encourages.

By leveraging what were merely private assets to support real business activities, the ultimate return of value to you as the asset owner is capable of very substantial enhancement.

It should, of course, be recognised that the interaction of leveraged assets with the market carries some risk, but the commercial management of that risk offers rewards which can never be realised by passive asset holding.

Those rewards themselves can then be structured to meet the real lifetime expenditure needs of the participants.



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The power of the Private Assets Liberation Plan

By using the former private assets to create and sustain a long-term business venture, the fiscal character of those assets is changed. The fiscal and commercial devaluation to which private assets are subjected is replaced by fiscal privileges and commercial enhancement.

Once the new business has become established, which will take at least 12-18 months; the business can take advantage of other value-enhancing Solutions. However, by then, the business assets will have had their market value substantially enhanced by their exposure to the market.

The Private Assets Liberation Plan will release the real value of your private assets, delivering to you a long term income and protecting the integrity of the commercial investment through a corporate and commercial trust structure.

After your death your family will have access to the residual business venture value and they will obtain controlled access to succession wealth.

Fully compliant, properly reported, totally effective.

Like all our solutions, The Private Assets Liberation Plan has been created to be fully compliant and permissible under trusts and tax law. The Revenue is protected against potential abuse of capital tax advantages by the transfer of your capital to a real business undertaking and receives appropriate tax receipts on your business income.

The transformation of private into business assets is fully reported to the Inland Revenue and the business asset value remains within the UK tax base, with business income being fully taxable.

If you feel this proven Solution may suit your requirements, please either forward these details to your own Professional Adviser or email us at info@mardons.co.uk for an initial discussion and to arrange an exploratory meeting which can include your Professional Adviser.



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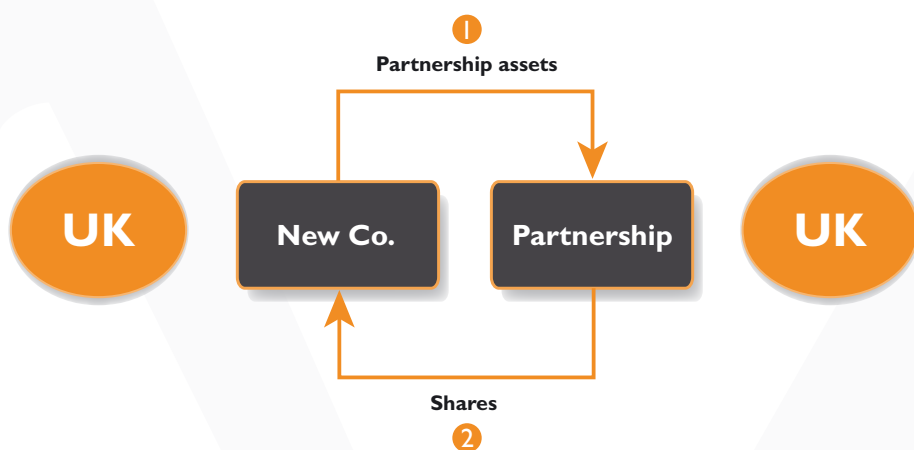
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How does the S162 Relief Work?



- 1 Assets acquired by New Co. at uplifted Market Value
- 2 Shares issued to Partnership at a value which reflects 100% of the capital gain



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Private Assets Liberation Plan – Case Study

PROBLEM

A Norfolk based farmer's sole trader's poultry business overtook his expectations because of the rise in demand for poultry. The business was producing multi-million pound profits and the level of the individual's taxation had become a real cause for concern.

He wished to reduce his taxation liabilities, protect and preserve his successful trading assets for future generations and continue growth to meet an ever increasing demand.

SOLUTION

He formed a partnership and traded for a further 18 months. The partnership was incorporated and the excess profits protected by a special commercial investment trust.

BENEFITS

- 1 No capital gains or inheritance tax arising from any of the transactions
- 2 Reduced personal tax liability
- 3 Trust technology allowed 100% loan back into sponsoring company without fiscal penalties
- 4 Trust protected from all creditors

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