LEVENDI

IHT INVESTMENT PRESENTATION

INVITATION

Levendi Investment Management would like to invite you to a presentation to introduce the new IHT share class of the Levendi Thornbridge Defined Return Fund. The new share class that has been specifically developed for use in Discretionary and Reversionary Trusts.

The Levendi fund offers investors a lower risk diversified equity market exposure. The Fund offers the prospect of positive returns that do not rely on rising markets and a degree of protection when markets fall. The new share class has been established with a zero distributable yield to avoid the issues created when trusts receive an income.

SPEAKERS

John Humphries, Way Group

John is an IHT expert. He will describe the benefits and features of the various IHT plans offered by Way Group, the benefits of reversionary trusts that invest in collective investment schemes and the benefits of funds that offer a zero distributable yield for reversionary and discretionary trusts.

David Stuff, Levendi Investment Management

Managing Partner of Levendi Investment Management will introduce the Fund.

TIMETABLE

You are invited to attend the lunchtime or late afternoon presentation. The presentations are scheduled to last 60 minutes to allow time for questions and discussion.

Date; 9th April 2019

Lunchtime presentation; 12.15 p.m. to 1.45 p.m. with a sandwich lunch and refreshments.

Late afternoon presentation; 4.30 p.m. to 6.00 p.m. followed by drinks.

VENUE

Cunard House, 15 Regent Street St. James's, London SW1Y 4LR

CPD

All attendees will qualify for 1-hour CPD.

RSVP

Places are strictly limited, to reserve your place please contact your Levendi contact or email us at info@levendi-im.com