



Prudential are delighted to be supporting the True Potential Wealth Platform with the Prudential Onshore Portfolio Bond.

Our onshore bond combines the advantage of a wide choice of assets available from a platform with the taxation and trust benefits of an onshore bond. Aimed at the clients with a lump sum investment looking for the potential of medium to long term growth, the bond provides tax efficient investment options to help suit both your advice process and your clients' needs.

### **Delivering additional planning value through an Onshore Bond**

The Prudential Onshore Portfolio Bond delivers the tax benefits of a bond with the investment flexibility of the platform:

- Diversity and choice of investment assets
- Individual tax calculations
- Tax efficient withdrawals
- Tax efficient changing of assets
- Top-slicing relief if applicable

As a non-income producing asset, the Prudential Onshore Portfolio Bond has potentially fewer tax considerations for a client or trust compared to a collective investment.

### **A full range of Trust Planning support**

The Prudential Onshore Portfolio Bond is supported by a full range of trust solutions to assist your Estate Planning activities. By following the links you can access individual trust information to assist IHT planning advice.

### **Supporting your advice process**

- [Why Bonds Adviser Case Study - Top Slicing](#)
- [Why Bonds Adviser Case Study - Assignment](#)
- [Why Bonds Adviser Case Study - Partial Withdrawals](#)
- [Prudential Onshore Portfolio Bond - Taxation examples - Adviser sales aid](#)

### **Key Literature**

- [Fast Facts](#)
- [Client Key Features](#)
- [Client Brochure](#)
- [Client Contract Conditions](#)

For more information please visit the dedicated pages on [pruadviser](#) for more information.