

WELCOME

THANK YOU FOR JOINING ME.

Before we begin, let me ask you a simple question.

If you died tomorrow, who would inherit more
from your estate?
YOUR FAMILY? OR HMRC?

Most people assume they know the answer.
The truth is, many don't.



Over the last **twenty-five years**,
I've reviewed **thousands** of portfolios
and witnessed more than **one
hundred** probate situations.

And I've noticed something surprising.



The biggest inheritance tax bills, the worst
probate delays and some of the most
damaging family disputes rarely happen to
people who are unprepared.

**They happen to people who think
they're prepared.**



That's why I wrote this book.

Because after seeing the same mistakes repeated again and
again, I realised there was a gap that nobody seemed to be
talking about.

IN THIS SERIES, YOU WILL DISCOVER:



The common weaknesses
I see in estates every day.



The hidden risks that many
families never spot.



How these issues impact your
family, not just your finances.



What you can do today to
protect what matters most.



A clearer path to build,
protect and transfer your
wealth with confidence.



IMPORTANT

I'm here to help you – and
I want you to succeed –
but I'm not giving any
financial, legal or tax advice.
This presentation is for
educational purposes only.

NOW LET'S GET STARTED.

2 | INTRODUCTION

THE BIGGEST MISTAKE

Most estate planning failures do not happen because families fail to plan.

They happen because families believe they have already planned.



PEOPLE WHO THINK THEY'RE SORTED

- ✓ Have a Will
- ✓ Have an accountant
- ✓ Have a financial adviser
- ✓ Have pensions
- ✓ Have investments
- ✓ Own their home
- ✓ Believe everything is organised



YET THESE SAME FAMILIES OFTEN EXPERIENCE:

- Unexpected inheritance tax liabilities
- Probate delays
- Missing documents
- Family disagreements
- Assets nobody knew existed

“

The biggest inheritance tax bills, the worst probate delays and some of the most damaging family disputes rarely happen to people who are unprepared.

THEY HAPPEN TO PEOPLE WHO THINK THEY'RE PREPARED. ”

3 | INTRODUCTION

WHY I WROTE THIS BOOK

After more than two decades in financial services, I've seen the same patterns emerge again and again. **And the consequences for families can be devastating.**

- 
25+
YEARS
EXPERIENCE
Working with individuals and families to protect and grow their wealth.
- 
5,000+
PORTFOLIOS
REVIEWED
Analysed across a wide range of assets, structures and generations.
- 
100+
PROBATES
OBSERVED
Witnessed first-hand the challenges families face during probate.
- 
ONE
CONCLUSION
PEOPLE THINK THEY'RE SORTED
But that belief is where the greatest risks lie.



AFTER SEEING THE SAME MISTAKES REPEATED AGAIN AND AGAIN...

I realised there was a gap that nobody seemed to be talking about.

This book was written to help families identify **hidden weaknesses**, avoid unnecessary **inheritance tax**, reduce **probate delays** and **protect** what matters most.

“

The people who suffer the most are rarely those who never planned. They are often the people who planned years ago and never looked at it again.

”

4 | INTRODUCTION

NOW LET'S BEGIN

This series starts with a simple but important observation.



EPISODE 1

I THOUGHT I WAS SORTED

Duration: 41 seconds

DESCRIPTION

Most families believe they have done enough planning. This short introduction explains why many people do not have a tax problem — **they have a planning problem.**

OVER THE NEXT 17 VIDEOS YOU WILL DISCOVER



Hidden estate weaknesses



Probate risks



Tax traps



The Seven Systems Framework



Practical ways to protect family wealth

LET'S START WITH EPISODE 1.

I THOUGHT I WAS SORTED.