

Improvements to e-Suitability - paragraph library version 1.4.33 30.3.2021

We are pleased to announce amendments to e-Suitability.

The most significant changes are:

- **Budget changes 2021**
- AUMs updated
- Minor layout corrections

Budget changes 2021

Changes have been made to take account of the changes confirmed in the last budget:

- | | |
|--|---------------------------------------|
| • ISA allowance | still £20,000 |
| • Junior ISA allowance | still £9,000 |
| • Income tax savings band | still £5,000 |
| • Age allowance | now £30,400 |
| • Capital gains tax allowance | still £12,300 |
| • Trivial commutation for pensions | still £30,000 but only for DB schemes |
| • Small pots trivial commutation limit | still £10,000 per pot max 3 pots |
| • Personal Pension contribution limit | still £40,000 |

Unchanged allowances are:

- Nil Rate IHT band still £325,000

AUMs updated

Particularly for investment recommendations, a figure for assets under management is a key statistic. Figures have been updated to the latest publicly verifiable figures.

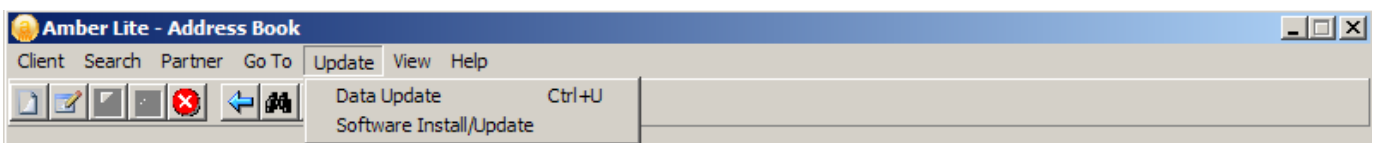
Minor layout corrections

The paragraph library has been reviewed and a number of small layout corrections have been made. In this connection, we are grateful for continued user feedback on any flaws found in the content, the correction of which will take precedence over all other development work.

New paragraph library

Amber Lite

If you have not already updated the software, select the “Data Update” option from the drop down menu which is accessible immediately after launching Report Writer.



Then follow the onscreen instructions.

Adviser Office

If you have not already updated the software, select the “e-Suitability data update” option from the drop down menu which is accessible immediately after launching Report Writer.

