

# Why lifetime mortgages are becoming a critical IHT planning tool



## What role do lifetime mortgages play in Inheritance Tax (IHT) planning?

"Great advice, from both financial advisers and tax specialists, will allow those clients to carefully manage their estate, get the most from their equity and mitigate their tax liabilities in the process."

With recent and the proposed changes to Inheritance Tax rules, there's a fresh opportunity for mainstream mortgage advisers, wealth managers and tax specialists to work with equity release advisers to help clients unlock value from their property while taking proactive steps towards reducing their tax burden.

In his latest article, [more2life's](#) CEO, Dave Harris, explores how lifetime mortgages are becoming an increasingly important part of the IHT conversation, and how advisers can position themselves to deliver even greater value to clients focused on preserving their wealth by leveraging modern features of equity release products such as downsizing protection, inheritance protection, and fixed early repayment options.

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