



Whateley
WEALTH

Whateley Wealth Management Limited

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Registered in England and Wales

Company Number: 09125961 Whateley Wealth Management Ltd is authorised and regulated by the Financial Conduct Authority

Don't forget

to use your 2022-23 ISA allowance

Don't risk missing out on the valuable allowances available. You can't carry over your ISA allowance, once the tax year has ended – use it or lose it!

Get in touch today!



For the 2022-23 tax year
the ISA allowance **£20,000**



Types of ISAs available include cash, stocks and shares, Innovative Finance, Junior and Lifetime ISAs. There are specific allowances for each of these, contact us for details. **Other tax efficient savings are available too.**

The value of investments can go down as well as up and you may not get back the full amount you invested. The past is not a guide to future performance and past performance may not necessarily be repeated. Penalties will apply for early withdrawal from a lifetime ISA.

