

Utilise CGT Annual Exempt Amount (AEA)

All details are input in Light Blue boxes

Name

Objective

Mr X

CGT AEA used on required withdrawal

1. Input name of client, and Select calculator objective .i.e.
 • Use CGT AEA available, or
 • CGT AEA for required withdrawal

2024/25 CGT Annual Exempt Amount (AEA)

£3,000.00

500.00

£2,500.00

2. Input amount of CGT AEA already used this year.
 Will then calculate;
 • CGT AEA available for current tax year

CGT AEA used this tax year

CGT AEA available

Value of current investment / portfolio

110,000.00

10,000.00

3. Input current value if investments(s) & Capital gain on those investment (s)

Capital Gain on current investment / portfolio

Withdrawal amount required

27,500.00

4. This box only shown if Objective is 'CGT AEA for required withdrawal'. input required withdrawal

Expected CGT on withdrawal

£2,500.00

25.00%

Will then calculate;
 • Expect CGT on require withdrawal OR Amount of investment client can sell, &
 • Percentage of investment(s) that will be sold.

Percentage of investment / each fund in portfolio