TFP Calculators

Utilise CGT Annual Exempt Amount (AEA)

All details are input in Light Blue boxes

Name	Mr X
Owner	Trust
Number (1)	1
Objective	Use CGT AEA available
2025/26 CGT Annual Exempt Amount (AEA)	£1,500.00
CGT AEA used this tax year	500.00
CGT AEA available	£1,000.00
Value of current investment / portfolio	110,000.00
Capital Gain on current investment / portfolio	10,000.00
Trust can sell;	£11,000.00
Percentage of investment / each fund in portfolio	**10.00%**
Withdrawal amount required	27,500.00
Expected Capital Gain on withdrawal	£2,500.00
Percentage of investment / each fund in portfolio	**25.00%**

1. Input name of client, and
   Select owner; Single, Joint, or Trust.

2. If Trust, this box will appear.
   Select no. of Trusts settlor has set up.

3. Select calculator objective;
   - Use CGT AEA available, or
   - CGT AEA for required withdrawal

   Will then calculate applicable CGT AEA.

4. Input amount of CGT AEA already used this tax year.

Will then calculate balance CGT AEA Available for current tax year.

5. Input
- Current value of investments(s), &
- Capital gain on those investment(s)

6a. If '**Use CGT AEA available**' objective selected;

Will then calculate / show;
- Amount of investment can be sold, &
- Percentage of investment(s) that will be sold.

6b. If '**CGT AEA for req'd withdrawal**' objective selected;

Input required withdrawal amount

Will then calculate / show;
- Expected CGT on required withdrawal &
- Percentage of investment(s) that will be sold.