

Success Report

“Passive income lets us plan for the future and give more to charity”

Peter and Faith Armstrong share an ultimate ambition, and that is to give more to charity after they die than they have in life. Intelligent investments, including Platinum Portfolio Builder and the creation of a Charitable Trust mean that they can achieve just that.

Speaking with Peter Armstrong is inspiring. A career in local government and a position on the Board of an international charitable organisation has given him valuable insight into charitable operations, and a unique perspective on what he and his wife Faith will leave behind them after they've gone.

“When a charity is left a legacy in a person’s will it is very gratefully received, however it cannot be budgeted for, the one off payment comes and goes” Peter explains *“when my wife and I came into an inheritance we wanted our money to work for us; to help us through retirement, but also to leave a lasting contribution to a good cause after we die.”*

Disheartened by paying into ever decreasing pension schemes, Faith and Peter recognised the need to be clever with the money they had come into. Peter remembers *“we wanted to make provisions for our retirement as well as generate funds for our Trust.”* Investments such as the Platinum Portfolio Builder held the key to achieving both.

Peter continues *“I’ve seen first-hand the difference a regular payment to a charity can make. Establishing a Trust means that Faith and I can continue to contribute in a meaningful way, for up to 80 years after we die”* Peter explains *“The charity will receive the regular passive income which we will use in life to bolster our pensions, as well as benefit from the sale of the portfolio once the 80 year Trust expires. Since we*

don’t have children, the thought of all the lives our smart investments will benefit after we’ve gone is very rewarding.” Speaking of their decision to invest with Platinum Portfolio Builder Peter recalls *“We were introduced to Nick Carlile, after peaking to Nick we realised that Platinum Portfolio Builder made sound financial sense and was a route to securing the passive income we were seeking.”* As well as a means to securing a wholly passive income, Peter and Faith made their decision based on their confidence in Nick and Steve *“It is vital given the nature of our plans that we establish a long term, secure relationship. We’re confident that with Platinum Portfolio Builder we have done this. The ethics and integrity the company is based upon together with the passive nature of the investment means our money will continue working for us long after we are gone.”*

Interview with **Peter Armstrong**

Property Investment Headlines	
Portfolio value:	£355,000
Gross yield:	9.4%
Equity in portfolio:	£101,025
Discount against value:	28.5%

Some of the numbers include forecasts based on actual performance to date