



# You and your business

How we can help you plan for your future  
and that of your business



# How we work with you

Our focus is on helping you achieve the very best financial outcomes for you and your business



## Discovery

### We will

- > Listen to you and gather all the information to help us guide you
- > Seek to understand your needs and what you are looking to achieve
- > Determine where you are financially at this time



## Planning

### We will

- > Carry out detailed analysis of your business to identify any gaps
- > Identify all potential solutions and consider all options
- > Make recommendations to help you achieve your business goals



## Solutions

### We will

- > Explain each of the proposed solutions in detail
- > Find the best products to meet your business needs
- > Give you clarity about your financial future



## Reviewing

### We will

- > Agree a plan to continually review the business to help deliver its goals
- > Be available to you for advice when needed

## Asking the Big Questions

How would your business survive if one of your key employees or shareholders became seriously ill or died suddenly?

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If your business partner died what would happen to their share of the business?

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Where will your retirement income come from?

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How would you feel about a shareholder's family joining your business if he / she died suddenly?

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If you died what would happen to your share of the business?

- > Are your spouse or children in a position to take your place in the business?
- > How will your family survive financially?

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How can you exit your business and be financially secure?

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When do you want to retire and how do you realise the value you have built in your business?

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# You and your Business Goals

Whatever your business goals are, we will work with you to create your financial business plan, keep it simple and help you put the right structures in place to realise those goals.



## What we do

**Our sole objective is to advise you on the appropriate solutions to maximise the value of your business.**

We specialise in helping businesses and their owners plan for their future. Whether it is succession planning providing financial security for your family, helping you retire when you want or ensuring an income in the event of disability, we can offer solutions to meet your needs and your business goals



Financial Planning



Retirement Planning



Investments



Wealth Extraction



Business Protection





## Contact Us



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