



Case Studies - Executives

Mr H is Chief Executive of a major Midlands Business and is non Exec Director of a number of others. He is very aware of financial matters and the need to stay on top of his finances but found it was becoming difficult to devote sufficient time to his own personal affairs. He therefore decided to outsource his planning to us.

Our advice

We regularly survey the best deposit rates and provide access to special rates only offered via advisers.

We have set up an online investment platform so both us and the client can get immediate information on his investments.

We provide a second opinion on financial ideas and facilitate any required changes to his portfolio.

Mr & Mrs C

Mr C is a highly paid director of a household name UK company. He has discovered he may be suffering from a hereditary disease that may reduce his life expectancy. They therefore wanted to plan so he could early retire from his job as soon as possible but maintain the family lifestyle.

Our advice

We completed a Financial Route Planner™ report and indentified that Mr C could afford to leave work in 5 years time as long as in the long-term they sold some of their holiday property.

We then gave them advice on structuring their finances to reduce Inheritance tax. Transferred a previous pension fund with limited investment choice into a SIPP on a wrap platform and started to set up a portfolio of investments that will fund their lifestyle after Mr C retires.