



ADVICE FOR PROFESSIONALS. NEW RETIREMENTALITY

Aged in my 60's, I sold my accountancy practice to another firm and continued in a consultancy role. While this meant I scaled back, I didn't view retirement in conventional terms. I wanted to maintain my business and other charitable interests, although I needed to understand whether I would have enough money to support my lifestyle.

Over the years I had accumulated various pension funds, Trusts and personal assets with different wealth managers, investment advisers and stockbrokers. Mostly I had done all of my own tax planning, but I relied on these and other advisers to support my broader wealth management needs.

Unfortunately my strategy was fragmented and I lacked a clear picture of my overall wealth. I really didn't know if I had enough money to support my objectives. What I needed was a plan that would enable me to generate an ongoing income upon completion of the buy-out.

My family is incredibly important to me and I wanted to have the freedom to spend more of my time with my children and grandchildren. I also wanted to be able to help them during my lifetime, whilst not compromising my own financial security.

I arranged a meeting along with my wife at Strategic Family Office. During our initial consultation we talked about our concerns and the things that matter most. Through the WealthOptimiser™ program we were able to see our position more clearly and make decisions about our future, including the transfer of our assets.

We decided to consolidate our investments into a new risk-managed portfolio, with the added benefit of reducing our overall investment management costs. Strategic Family Office also helped us to create a Legacy plan, to ensure the efficient transfer of assets to the next generations upon our death.

Looking to the future we feel confident and secure, knowing we have enough money to support our lifestyle. We will also see the benefits of our wealth, for our children and grandchildren, within our lifetime.

Strategic Family Office provided the co-ordinated approach we needed to organise our finances and investments, drawing on the skills of their expert team. Overall, our costs have been reduced and through careful planning, we have minimised our tax liabilities and the amount of risk we are taking with our portfolio.

Our clients value our discretion. For confidentiality reasons, some of the information in this case study has been changed including the client name.

“We like having a trusted adviser we can bounce ideas off, one who maintains regular contact so we always know where we stand.”

RICHARD & PAULINE