



Supporting our Accountancy Partners

We understand that clients often need more than one type of professional service. We can't do everything and it is crucial that clients are able to access a full range of services offered by trusted local professionals that we can work effectively and efficiently alongside. We have a keen focus on developing close relationships with fellow professionals so that together, we can provide clients with a fully integrated service that ensures they receive exactly what they need.

Similarly, as an accountant there are times where you will need to call in other professionals. We work hand in hand with accountants to ensure that clients receive a full and joined up service. We understand that you need to be able to rely on a trusted partner to deliver a service you are happy to recommend and work alongside. We will endeavour to meet the high standards you set for work with your clients and make sure we work together effectively on ensuring any solution is the most suitable one.

To give you some idea of where we might be able to assist you with your clients, we have listed some areas of need, where there may be financial solutions available to your clients.



New Business Set Up

- Shareholder Protection
- Income Protection
- Partnership Protection
- Pension Planning
- Cross Option Agreement

Tax Year End / Business Year End

- Carry Forward
- Utilising ISA allowance
- CGT
- Regain Personal Allowance

Wind up/ Selling Business

- Business Property Relief
- Entrepreneurs Relief
- IHT planning
- Pension Contributions
- Venture Capital Trusts & Enterprise Investment Schemes

Raising Additional Finance

- Loan Cover
- Small Self-Administered Schemes (SSAS)

Succession Planning

- Business Property Relief (BPR)
- Trust Planning
- Life & Illness Cover
- Links to Solicitors

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