



WORKING TOGETHER TO DELIVER VALUE WITH OTHER PROFESSIONALS

Spouse / dependant protection on death	● ● ● ●
IHT / CGT mitigation	● ● ●
Mortgage services	●
Loan protection e.g. critical illness cover	● ● ● ●
Income protection e.g. disability, illness	● ● ● ●
Protection of key directors / employees / partners	● ● ● ● ●
Shareholder and partnership protection	● ● ●
Retirement solutions	● ● ● ● ●
Employee benefits	● ● ● ● ●
Use of trusts in investment business	● ● ● ●
Corporate investing	● ● ● ●
Extracting profits	● ● ● ●

ACCOUNTANTS

- Preparation of accounts
- Tax and trust planning
- Audit
- Insolvency
- Business start-up
- Business sale / purchase / expansion

