

PLANNING MEANS DOING BETTER

‘A sailor without a destination cannot hope for a favourable wind’



As we move into summer, many of us are nearing our holidays – a time we can use to both reflect on the year so far and look towards the next few months and beyond.

It is a well known fact that the businesses that plan tend to outperform those that don't and yet many business owners fail to perform this important task. I am a great believer in the planning process; in my opinion, the time needed to create a proper business plan is always going to be time well spent. I don't mean an 'Accountants Business Plan' for the bank, I mean a plan for you.

We would like to spend more time helping you with your future. Previously we have spent most of our time reviewing your past, looking at your accounts and the resulting tax position.

With this planning approach we are hopeful that we can work with you on your future plans, specifically regarding;

- Tax planning
- Wealth management
- Retirement funding
- Life insurance issues
- Profit improvement

If you are looking to undertake some 'real world' planning and would like any help, we would love to meet you free of charge to set up a simple but potentially critical process for deciding where you want to be and how to get there.

Please let me know if this is something you would like to know about.

