



## A BRIEF GUIDE TO OUR COMMERCIAL SERVICES

### Why Square One is almost unique

Square One Financial Planning LLP is directed by a financial advisor with over 20 years experience working with high net worth clients; and a chartered accountant who formerly ran his own very successful accountancy practice dealing almost exclusively with business clients, ranging from sole traders to groups turning over in excess of £60 million.

This near unique blend of accountancy, tax and investment skills gives us a huge advantage in helping businesses with risk and wealth management.

### Our key services include

- Accessing the financial risk which could arise from the death or incapacity of directors/partners and key staff
- Providing a financial package to pay off the spouse of a deceased shareholder or partner
- Working with your solicitor on partnership or shareholder agreements and service contracts
- Creating a package of benefits to help you recruit and retain key employees
- Dealing with your statutory obligations to provide a stakeholder pension scheme
- Setting up or managing your executive/employees' pension scheme
- Creating a retirement plan with a programme to meet pension needs
- Developing a tax-efficient remuneration structure for limited companies
- Working with your accountants to ensure you obtain all available tax breaks
- Avoiding Capital Gains Tax taper relief pitfalls
- Investing surplus cash
- Avoiding Inheritance Tax pitfalls caused by incorrect investment plans
- Helping you raise commercial finance for acquisitions or expansion

Call **FREE** on **0800 071 1177**

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