

Financial planning for entrepreneurs

Topics that can help you gain the full perspective on your financial situation

When we talk about financial planning, we refer to the topics shown in the chart. We go into more detail with you, work out the interrelationships between the different elements, and define any potential for optimization, taking into account your personal goals and requirements.



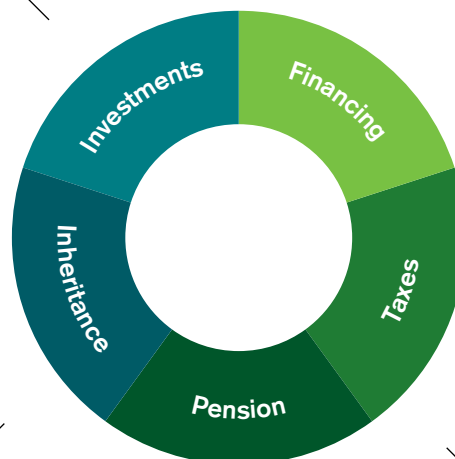
Investments

- Earned income, profit
- Investment income
- Other income (e.g. pensions)
- Regular expenditure
- Extraordinary expenditure
- Business owner's salary and dividend policy
- Withdrawal of funds not required for the business
- Sale, liquidation
- Savings
- Liquidity
- Capital investments and insurance
- Difference between private and business assets
- Contingent rights
- Asset performance
- Risk profile
- Market expectations
- Return potential



Financing

- Mortgages and mortgage interest
- Repayments
- Other loans, leases
- Support payments
- Investments in real estate
- Children's education



Inheritance

- Marriage/partner contract
- Will and beneficiaries
- Regulations under inheritance law, inheritance contract
- Company succession
- Lifetime gifts
- Establishing a foundation
- Appointing a foundation as beneficiary
- Execution of wills
- Gifts, advancements
- Advance directive



Pension

- Pension cover, pension gaps
- Pension provision with Pillar 2 and Pillar 3
- Pension solution for employees
- Employer contribution reserves
- (Early) retirement
- Lump sum or annuity on retirement
- Living expenses



Taxes

- Systematic tax planning
- Tax optimization
- Transfer of private/business assets
- Contributions to pension provision
- Tax domicile and marginal tax rate
- Real estate holdings and repayments
- Real estate tax, real estate gains tax
- Inheritance and gift taxes

Contact us

We will be happy to arrange a personal consultation.

Call us at 0844 200 114*

For more information, visit our website at:

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* Telephone calls may be recorded.

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