



Family-focused business owners

As a family business owner you've spent your whole life building your business to where it is now. You're proud of where you've come from, and where you've taken it to—and rightly so.

But you're probably finding that you spend so much time managing your business' financial matters that you may have neglected your personal finances. You may be looking to start transitioning your family business on to your children, but unsure of how to successfully go about this.

Your wealth transition doesn't have to be painful. Stephan Independent Advisory are here to provide you with guidance throughout the process and help you see that there's a life for you on the other side of working, one that we can help you maintain, so you can enjoy seeing your business prosper, even after you've let go of the reins.

What you care about

- Your business, and seeing it continue on under new management once you've successfully exited
- Your family, and seeing them supported once you ease out of your business
- Giving back to the community through social work and charitable giving
- Making the most of your time, whether it's spending it with your family, on your hobbies, or being a part of your community

What's worrying you

- The stress and uncertainty involved with transitioning your family business
- Creating a strong, long-term business plan that ties in with your family's financial plan
- Financial security for both you and your partner once you've handed over the reins
- How to change the levels of taxation you may be paying
- How to effectively manage your personal finances with the wealth you've accumulated through your business
- Your family's financial future when you're no longer in the picture

How we help you

We help you take the uncertainty out of your wealth management, and work with you to create and deliver a long-term Wealth Management Plan that sees your personal and business finances taken care of, and your family business and legacy successfully preserved for the next generation of owner.

By putting your cash flow to good use now, this means that your ideal life becomes less reliant on your business success, and you can make plans to hand over the reins when it's time. We'll be with you every step of the way, meeting with you regularly to continually review your progress and make sure your strategy is keeping pace with the changes in your business, and your life.

Together with you, we'll make sure your Wealth Management Plan continues to meet the evolving needs of your business and your family for the long term.



Stephan
Independent
Advisory

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