

# Estate Planning:

Protecting your business, your family and your estate.



Estate planning is not just about Inheritance Tax. It is about protecting the business, your family and ensuring your estate distribution is structured in the right way. Our three-stage process gives you clarity on your exposure and a practical plan to address it.

## OUR PROCESS

**01**  
STAGE

### ESTATE REVIEW

#### UNDERSTAND YOUR POSITION

Our starting point is a consultation to map your full estate, business interests, property, cash, liabilities and existing structures - and identify your IHT exposure under current rules, along with any areas of risk or opportunity you may not be aware of.

**02**  
STAGE

### PLANNING & ADVICE

#### CLEAR RECOMMENDATIONS

Based on the estate review, we hold detailed conversations about your wishes and provide clear, practical recommendations with a prioritised action plan. We explain the options in plain English and help you understand the trade-offs before making any decisions.

**03**  
STAGE

### IMPLEMENTATION

#### GET IT DONE

We work alongside solicitors, financial planners and your family to get the right structures in place. We manage the process so you do not have to, and provide ongoing support as your estate evolves.