



Lifecycle Review

Maggi Electronics are one of the country's leading electronic repair centres. Having transformed the company into a profitable, well-organised business, it was time for Joe to turn his attention to his family's financial affairs.

Before

- ✗ Joe was unable to confidently plan for his retirement. He did not know how his personal income and expenditure, assets and liabilities, pensions and investments would impact on his family and business over the next 5-10 years.
- ✗ Having worked hard to build up his business, Joe wanted peace of mind that he would be leaving the company in a strong financial position.
- ✗ As a family man, it was important for Joe to take responsibility to ensure he could provide a secure legacy for his family.

After

- ✓ Hallidays Lifecycle Review provided Joe with a clear perspective from which he could confidently plan and take action to ensure he and his family would have a secure future.
- ✓ We reviewed all the areas of his family's finances and supported Joe to structure the business and his family's affairs in the most tax efficient manner to safeguard assets and ensure an income stream for his current and future lifestyle.
- ✓ Hallidays put in place a step-by-step plan to enable Joe to relax safe in the knowledge he will be able to enjoy a comfortable retirement and provide his children with a great start in life.

Outcome

The Lifecycle Review has enabled Joe to take a step back from running his business by answering the big questions 'What am I working for?' and 'What do I want for my retirement?'

With a clear pathway to financial security and independence, Joe has removed considerable stress from his remaining working years. He now has peace of mind that when he retires he will be leaving his business on a firm footing. He can extract the funds he needs to enable him to enjoy the happiness of living the lifestyle he wants in his retirement and continuing to provide a secure future for his family.

What the client said

“*Hallidays made me look at the hard facts and take responsibility for my own future and that of my business. Now, I can look forward to my retirement and have peace of mind that the business we have proudly built up will continue to thrive.*”



Joe Pritchard
Director - Maggi Electronics