

# AdvisorPro for Business Owners & Company Directors

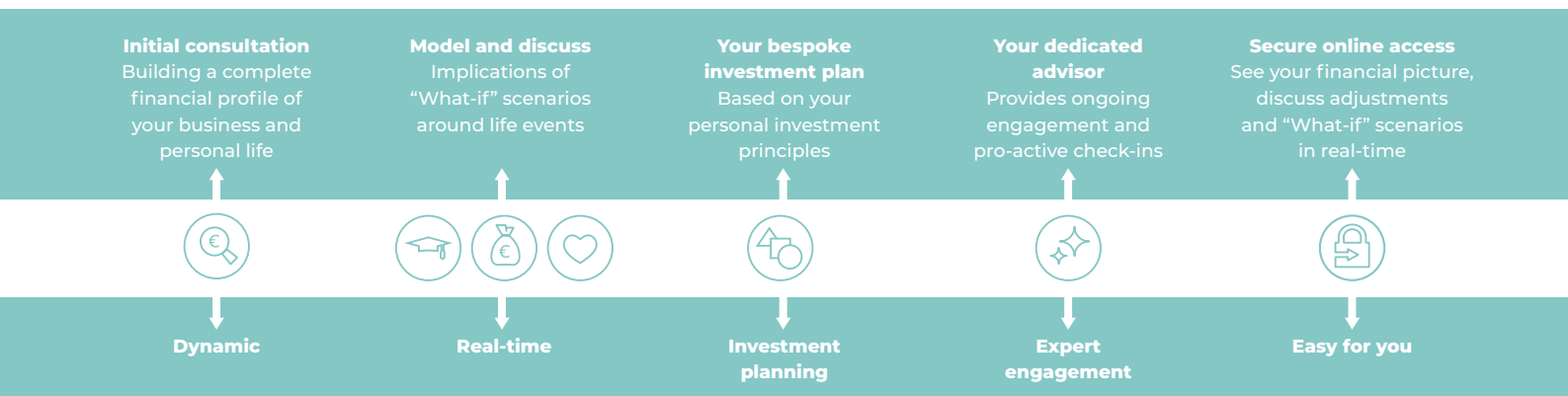
## Introduction to AdvisorPro

At Acuvest, we recognise how interlinked your business and personal life are from a financial perspective. The success of your business has a direct impact on your personal financial capability and your potential to achieve your goals in life.

AdvisorPro is our **dynamic financial planning** service designed to help business owners and company directors optimise your financial resources across your whole life. Through this interactive and collaborative process, we enable you to build a structured and effective financial plan which incorporates your business assets, your personal investments, pension benefits and personal finances, all with a view to enabling you to live your desired lifestyle now and into retirement. For business owners and company directors, exit strategy and succession planning form an important part of the AdvisorPro financial and investment advisory service.

Our expert and professional team of investment advisors work with you to develop a dynamic and tax efficient investment plan which incorporates your specific objectives, beliefs and principles. Our approach provides you with a bespoke investment plan that underpins your financial and life goals.

## How we work with business owners & company directors



## A dynamic approach to financial planning

The AdvisorPro process recognises that you live in an ever-changing world of building your business, working long hours and taking calculated risks, while also funding your personal life. Your financial plan needs to be equally dynamic, looking across your business and personal life, changing in line with your circumstances.

AdvisorPro provides you with a comprehensive understanding of your financial picture, now and into the future. It enables you to get organised and builds a comprehensive roadmap towards achieving all your goals. With secure online access to your financial plan, you can see your full financial picture at any time and have the option to test 'What-if' scenarios in real-time. Your dedicated Acuvest investment advisor is there to support you and to advise you on the financial effect of each scenario. Your advisor will also proactively check-in with you once a year to review your plan.

## Key benefits of AdvisorPro



### Our holistic approach

See the bigger picture across your business and personal life and build a plan for your entire financial life and into retirement.



### Simplify. Organise. Optimise.

A strategy that you understand completely, can visualise easily and that shows a clear roadmap to your goals.



### Bespoke investment plan

Your specific objectives, beliefs and principles sit at the heart of your investment plan.



### Achieve your goals in life

Through careful and expert planning with all of your financial resources, we help you live the life that you want to live.



### Align your business with you

A plan to extract wealth from your business effectively and manage your assets from business exit into retirement.



### Be confident of a secure future

Enjoy the peace of mind that comes with knowing you are maximising your financial potential and have the best possible future ahead.



### Life is dynamic, not static

Business owners live in a dynamic world. Your AdvisorPro plan is always available and is updated regularly at our check-in meetings.

## Our 6 stage investment planning process to underpin your financial plan



## Your annual check-in meeting

Your dedicated advisor will pro-actively check-in with you annually to discuss any changes to your circumstances. This review meeting will focus on:

- Your business and life goals
- Changes in your business and personal life
- Your investment objectives
- The economic backdrop
- Today's investment markets
- Your investment strategy
- Your retirement plan
- Your estate plan
- All related financial matters



## Acuvest's investment experience

For all our clients, their financial plan is underpinned by an appropriate and suitable investment plan developed by an investment professional. Acuvest is an independent, investment advisory firm providing independent advisory services to institutions, corporates, charities, and individuals – we advise our clients on more than €4.5 billion in assets and impact the futures of more than 40,000 households.

Our investment planning process brings this institutional investment expertise to enable you to achieve your personal and investment goals.

*“The Acuvest process really helped as it gave us the tools to think about our bigger, longer-term financial needs and laid our financial plan out for us really clearly and simply.”*

## Our fee approach

At Acuvest, we offer quality, independent financial advice. We have no conflicts of interest within our processes and **we do not accept any commissions** from product or fund providers. We work only for you, and on a transparent fee basis that is agreed in advance.