

Why Business Owners Needs a Personal Plan

Why It Matters

Running a business often means juggling customers, staff and Revenue deadlines. Personal finances are easy to push aside. A clear plan brings direction and confidence.

1. A Plan Is Not a Product

- A pension isn't a plan.
- An investment isn't a plan.
- Life cover isn't a plan.

2. What a Plan Does

- Shows where you are now.
- Defines where you want to go.
- Maps the steps to get there.

3. Cash Flow Modelling

- Connects business and personal finances.
- Tests “what if” scenarios before decisions.
- Helps answer when to retire, how much to draw, and whether to reinvest or fund pensions.
- Learn how reliefs like Retirement & Entrepreneur relief can help you maximise assets
- Plan for large one off events in your life

4. Timelines & Horizons

Plan across horizons: short, medium, long-term.



Ready to talk? Book a consultation today.

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