



FOR PROFESSIONALS
SINCE 1941

INSURANCE

SPECIALIST SUPPORT
SERVICES

BUSINESS PLANNING

LET US FOCUS ON THE BUSINESS SO THAT MEMBERS CAN FOCUS ON THEIR PROFESSION

Business planning involves holistic consideration of all elements that may impact a member's current business structure and current business succession plan. It includes tax efficiencies and legacy considerations when planning business succession.

THE PROCESS



Determine business planning and succession goals.



Discuss business assurance tools and strategies.



Collect data and information required.



Implement business plan.



Analyse the data and discuss implications.



Monitor and review.



CURRENT BUSINESS STRUCTURE REVIEW

We understand that to review an existing business structure and all the potential consequences can be overwhelming for a member.

Our service includes:

- Reviewing the current financial plan of the business,
- Exploring the business's goals and considering the appropriate business structure to execute those goals, and
- Doing an analysis of agreements that may currently be in place.

Furthermore, we offer advice on the business structure to ensure that it is tax-efficient regarding estate duty and income tax.



BUILDING BUSINESS SUCCESSION

This service looks holistically at the business succession plan and will thoroughly explain what the implications would be, should one of the business owners pass away. We review current business succession agreements (like buy and sell agreements) and explore policies that are in place for this purpose. We also ensure that policies and agreements are compliant with legislation and are tax-efficient.

Service offered:

- Business needs analysis
- Drafting of buy and sell agreements
- Key Person insurance
- Contingent liability (agreement and insurance)
- Credit loan accounts

CONTACT US

We are a team of experts in our chosen fields, working with financial intermediaries to deliver an exceptional member experience.

Contact us at specialistsupportservices@pps.co.za