

**TOOL 1.2:** Offer to CEOs and senior executives

**PURPOSE:** A framework for the design of a marketing brochure targeting business owners.

*\*Client facing tool to be cut below the dotted line and embodied into personalised branded document*

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## **THE CEO AND SENIOR EXECUTIVE ADVICE AND CONSULTING PROGRAM**

### **Now there's someone to look after you while you're looking after the company!**

We know you have dedicated many years to the development and success of your company and have been focused on the needs of the board, the shareholders, the employees and your clients. Therefore, there hasn't been much time to obtain the answers to all those questions you have about financial matters, your investments and you and your family's future.

How do we know this? Because at <business name> many of our clients are executives like you working with both listed and private companies in industries ranging from financial to resources. So we are aware of many of those questions you have. And we'll take the time to understand the other issues which are specific to you.

### **Are these some of the questions you need answered?**

- When is the best time for me to retire?
- When should I exercise my options?
- How do I manage my employee share entitlement in the most tax effective way?
- Should I take my super benefit as a lump sum or pension or both?
- How am I affected by the new super rules?
- What should I do with my investment properties?
- Should I be investing more in superannuation, tax effective investments or property?
- Should I be transferring some of my assets to the children now or later?
- What are the appropriate protection strategies for my family, my assets and my income?

Our research shows these are some (but definitely not all) of the important issues that CEOs and senior executives need advice on.

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**This program is all about you!**

The components of the CEO and Senior Executive Advice and Consulting Program are delivered in order of priority and within a timeframe that works for you. Therefore, you will receive all the advice that will help you achieve your goals and your objectives.

Tax effective strategies for you in your current and future life phases include:

- o A structured corporate exit plan
- o Strategies to protect your assets, your income, your family and your life now and in the years ahead
- o An investment plan to fund the lifestyle that is important to you – now and as you exit the workforce
- o The confidence and reassurance that someone is looking after your best interests and working with you in an environment of trust, empathy and care.

**WHAT CAN YOU EXPECT FROM OUR PROGRAM?**

**A Personal tax savings and effectiveness plan** – Documented advice on all matters tax, receiving your employee share entitlements, exercising your options, salary sacrificing, salary packaging, agri-investments, other tax effective investment strategies and trust establishment.

**Personal investment plan** – Strategies that will help you make the appropriate investment decisions to achieve what’s important to you both now and in the future. This plan will be developed after examining all the options available to you including investment property, shares, managed funds, and tax effective investments.

**Personal protection plan** – Protection strategies for your non-business assets including your home, car and family assets.

**Asset ownership plan** – Ensuring you have the appropriate strategies in place for the current and future ownership structure of your assets and wealth.

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**Debt management plan** – A review of your current personal and investment borrowings and advice on the appropriate debt strategies for the future. This may include restructuring your home mortgage or current investment borrowings and/or funding future investments or home renovations or upgrade.

### **HOW DO WE DELIVER THIS PROGRAM?**

**We listen** – We spend a lot of time understanding what's important to you. Once we understand your priority needs we'll prepare a proposal detailing the specific offer to you. The proposal will include delivery time frames and indicative costs.

**We introduce** – Helping you achieve your goals and objectives will normally require advice from more than one specialist adviser or consultant. We will liaise and schedule appointments with the appropriate specialist(s). At these appointments the specialist adviser will gather all the information required for them to analyse the various solution options and prepare the advice that is appropriate for you.

**We advise** – At a subsequent appointment we will present the advice and discuss it in detail encouraging your questions and ensuring you understand why it has been recommended to you.

**We document** – Our advice will be documented including all the detail around recommended products if applicable, related fees and charges, why this advice has been recommended and how it will help improve your situation.

**We monitor** – We monitor all the issues that may influence the appropriateness of this advice on an on-going basis. We advise you of any changes that may need to be considered due to changes in your circumstances, the business, economic or legislative environment.

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**We communicate** – Your advisory team will maintain frequent contact through various means at the relevant time. This may include face-to-face meetings, our regular publications, our website etc. Of course, we encourage you to call us at any time if there are queries or issues you would like to discuss.

**We care – YOU** and your wellbeing is what’s important to us. We will always act in your best interest and make decisions that deliver the best outcomes for you. Your success is our success!

## **PRESENTATION OF THIS DOCUMENT**

Options to present this offer are:

- o Printed: In any desired format such as A4 double sided, A4 folded pamphlet or plain A4 to add to a presentation folder. Examples below.
- o Electronic: In pdf file or displayed as an attachment on your website.

### **A4 double sided example:**

First side – Introduction, positioning and offer

Reverse side – The explanation, business contact and general info

### **A4 folded example:**

Page 1 – Cover

Page 2 – Introduction, positioning and the offer

Page 3 – The explanation

Page 4 – General and contact information

It would be valuable to receive advice from a marketing specialist / graphic designer on an appropriate template for the presentation of this offer that is aligned with your business brand.