



Personal
Finance
Society

Standards. Professionalism. Trust.

Agenda

Yorkshire Chartered Connections
Breakfast May June 2019

Venue:

Elland Road Stadium Leeds, Elland Road, Leeds, LS11 0ES

Date:

Tuesday 21 May 2019



In association with our Partners in Professionalism:

21-May-2019

07:45 - 08:15 Registration

08:15 - 08:20 Welcome and Introduction

Stephen Wilkinson, Charles Wilkinson Financial Plannin

08:20 - 09:00 Corporate Financial Planning

- Identify the methods by which a business owner may exit the business (eg sell to a trade competitor, sell to staff or a co-shareholder, sell/gift to family next generation, die 'at a ripe old age', die prematurely, unable to work through serious injury or illness)
- For each of the above methods, consider the effect on the business, the effect on the exiting business owner and what pre-exit financial planning should be done.
- Identify how a business owner can secure 'Financial Independence' from the business without exiting the business (eg maximise the personal balance sheet as well as the business balance sheet).
- Understand the business owner's strategy for the business and how this impacts on the above (eg (a) strategy to maximise profits and cash, (b) strategy to maximise extractions from the business, (c) hybrid).

Andy Haigh, BHP Corporate Finance

09:00 - 09:10 Closing remarks



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The content in each session has been carefully selected and can be considered for both structured and unstructured CPD hours, depending how this activity addressed each individual's personal development needs.

Structured CPD is the undertaking of any formal learning activity designed to meet a specific learning outcome (this is what an individual is expected to know, understand or do as a result of his or her learning).

Unstructured CPD is any activity an individual considers has met a learning outcome, but which may not have been specifically designed to meet their development needs.

Attendance at this event can be included as part of your CPD requirements should you consider it relevant to your professional development needs.

