



Setting Up Your Business for Success

Protect & Preserve

November 2019

YANN HARRISON

We're by your side



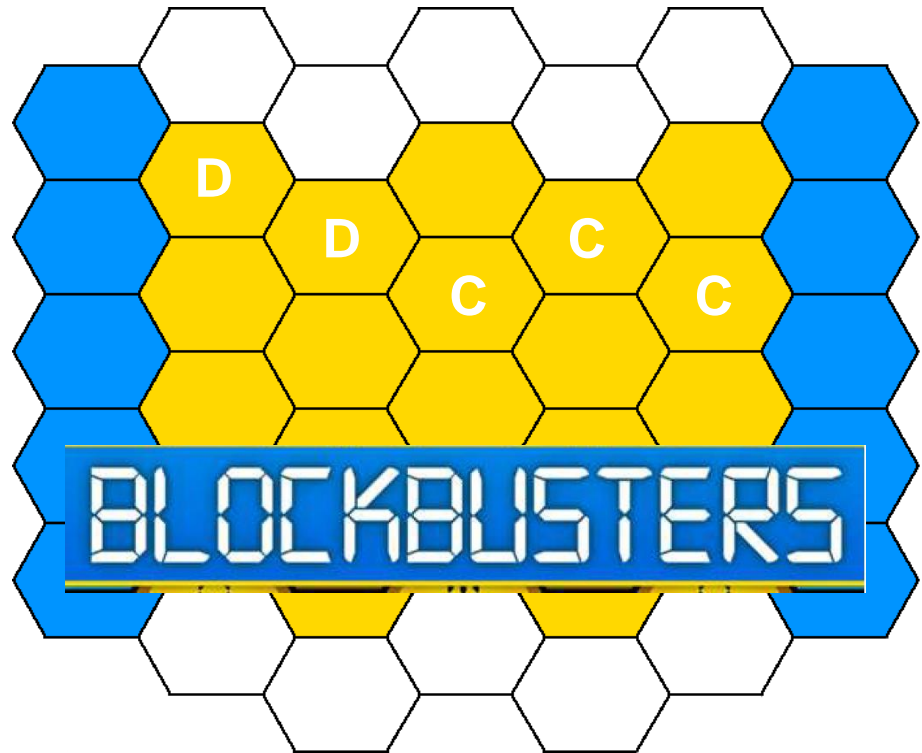
Recap, 2 D's and 3 C's please....

The 5 D's

1. Death
2. Disability
3. Divorce
4. Disagreement
5. Distress

The 4 C's

1. Human Capital
2. Customer Capital
3. Structural Capital
4. Social Capital



Them, It, Me & mine



Them

Employer

- > Tax deductible
- > No PRSI

Employee

- > No BIK
- > No medical



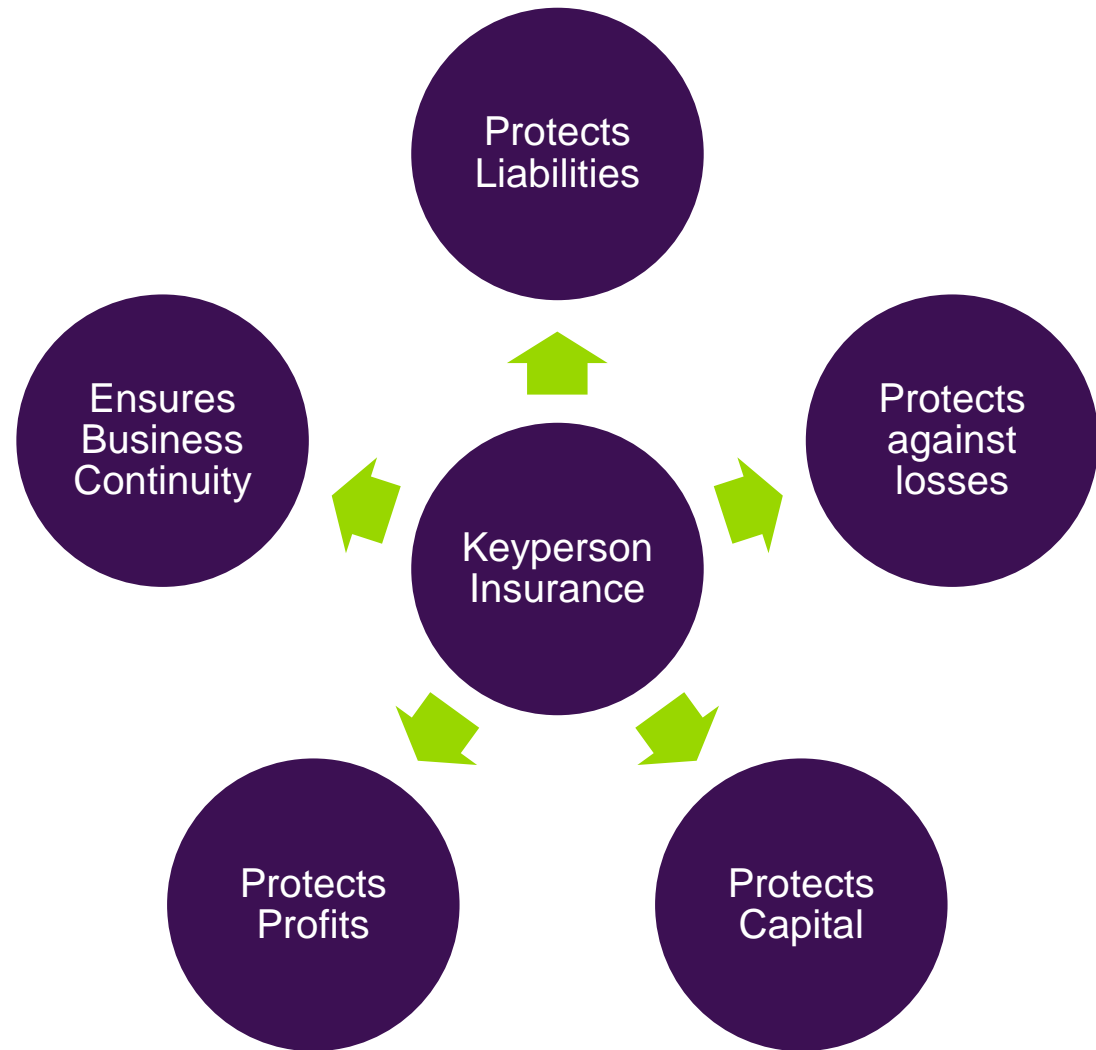
It ... Keyperson Cover

Tax deductible(?)

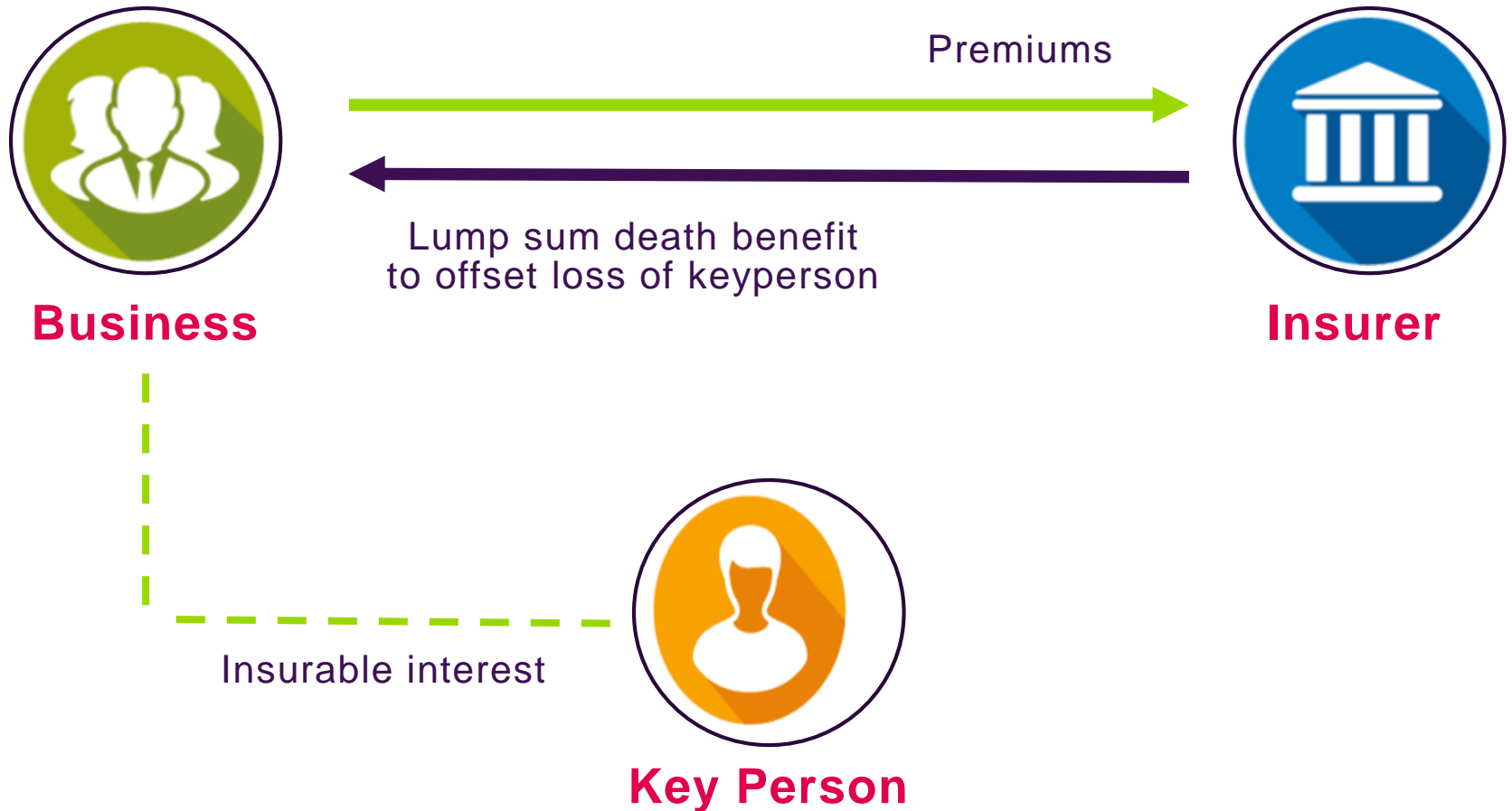
Taxable receipt(?)

Medical

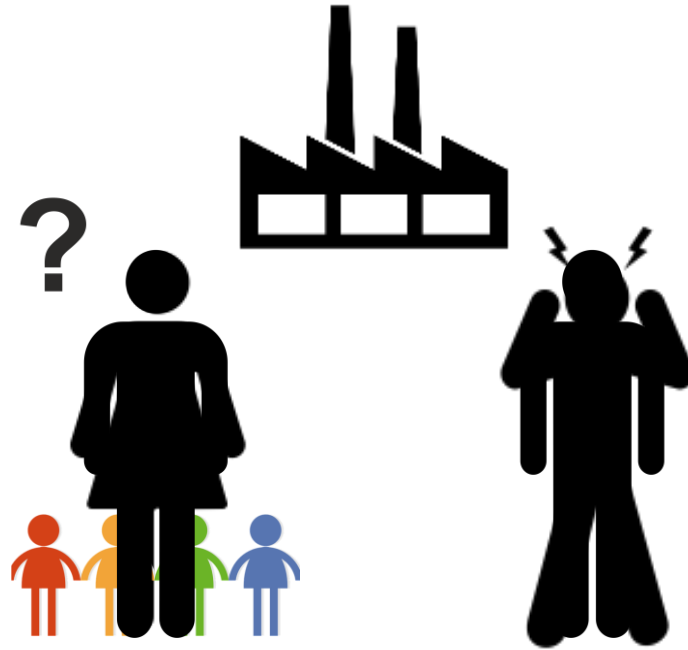
Valuation(?)



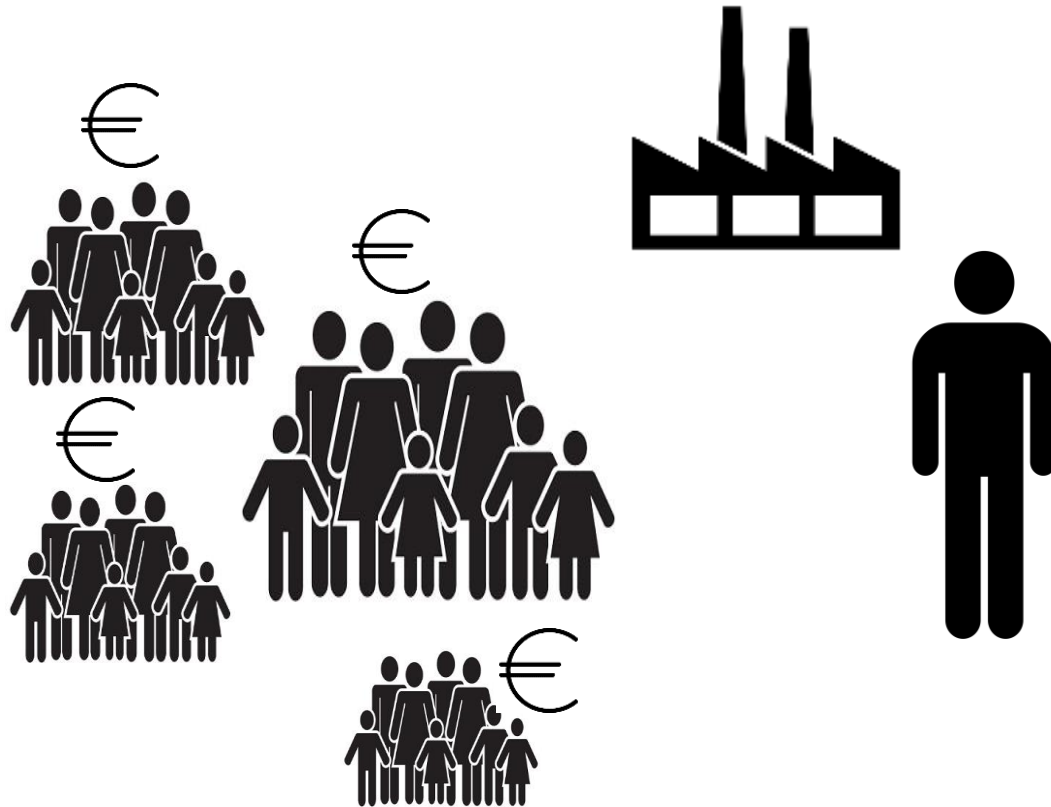
How it Works



Me and Mine, You and Yours



Control Dilution...

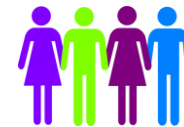
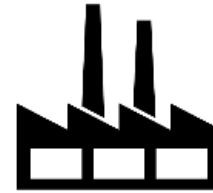
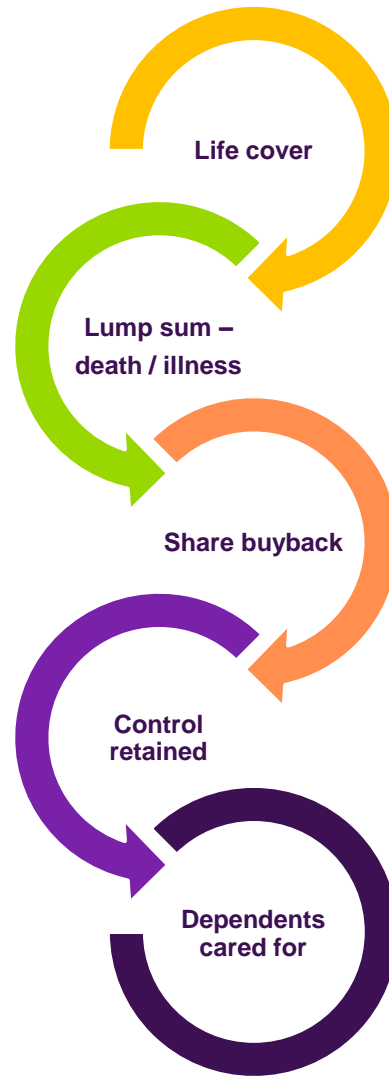


Too Many Cooks...



How it works

Corporate Co-director Insurance



Retirement Provision...





Taxes

Now, is there
something I was
supposed to do
today?

Preserving Value...Call to Action

- > Large amounts, regularly
- > Defined exit
- > Small amounts, regularly
- > Revenue approved gift tax shelter
- > Revenue approved inheritance tax shelter
- > Succession structures – company, partnership, trust
- > Will and Enduring Power of Attorney




Thank You

 @RBK Chartered Accountants

 @RBKCA

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