

PLANNING FOR RETIREMENT

STRUCTURING YOUR AFFAIRS

After running a successful chain of convenience stores, I was looking forward to retiring in 5 years. My pensions and investments were with multiple providers so I was unsure whether I could afford to retire. I wanted to understand how I could structure my affairs to turn my retirement goal into reality.

Over 30 years I had accumulated pensions and investments, which seemed like the right decision at the time. Unfortunately there was no cohesive strategy and I had policies with multiple providers, mountains of paperwork and direct debits leaving my account on a monthly basis.

I approached PK Partnership on the recommendation of a friend, to explore the best way to coordinate my investments and pension, creating a plan that would enable me to lead a comfortable retirement and provide for my family.

Prakash took time to understand my objectives and review my existing arrangements. He provided a consolidated view using their in house technology to collate information on all of my holdings and showed how he could help to clean up my affairs.

They reviewed my full situation, assessing and reporting on the suitability of my short, medium and long term investments. Prakash created a new tax-efficient investment strategy based on scientific investment principles.

My attitude to investment risk was matched with the risk required to achieve returns that would enable me to meet my objectives without putting my long-term goals in jeopardy.

My new plan took only 3 months to review and fully implement. Adopting this strategy means I am on route to retirement in 5 years. I'm confident that PK Partnership acted in my best interests and happy they have helped me to protect, preserve and enhance my wealth.

Thanks to PK Partnership, my family are well taken care of. I take comfort in knowing I have access to my holdings, reports and valuations 24x7 via an easy to understand, secure online account. I meet Prakash on a quarterly basis to review my affairs and to ensure I remain on track to meet my goals. I can now relax and enjoy the last few years working in my business.

“ I'm incredibly impressed with the expertise and integrity of PK Partnership. Thanks to them I can relax and enjoy the final years I have running my business, knowing my retirement goal and finances are well looked after.”

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