

Lesser & Co

case study

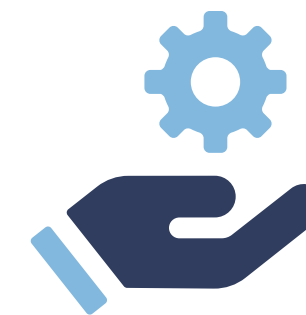
The client engaged
with us and this led to
over £34k of tax savings



This client came to us from a firm that provided **minimal tax planning** and charged huge fees. A large corporate firm less interested in their clients as people and just looking to build volume rather than client success.



We identified numerous areas that were not optimal and made several recommendations.



Key areas of planning included vehicle structuring and income planning, personal drawings continue to be high but a solution is in place to give clarity and exercise control and tax efficiency. Children are currently too young but once old enough will be brought into the business in the next 12 months.



Through meaningful conversations, advice and regular contact, lots of actions completed and very much appreciated.

