Client Case Study: Integrated Wealth Strategy for an Enduring Legacy

Your legacy isn't just about managing passive wealth once you enter your golden years. Many entrepreneurs remain very active post-retirement – providing the skills, knowledge and capital developed over a life time to the next generation of entrepreneurs. With the help and guidance of a trusted advisor and client management team for over 30 years, our client has the ***peace of mind*** that his legacy will endure for future generations to come.

Currently a retired business owner, our client has built, managed and successfully sold his family's apparel manufacturing and distribution business that had operated in Australia for over 40 years.

Having generated and then realised considerable wealth through the sale of his business, our client was particularly focussed on the passive management of these funds in order to provide a growing income stream for his family. Naturally with the amount of wealth involved, asset protection was also key.

The sale of his family's business also enabled our client to enter an active post-retirement, where he has embarked on numerous investment endeavours across private business and property development.

THE CH PROCESS

The Cameron Harrison process has assisted our client plan for his various investment pursuits, both active business interests and passive investments, in a forward-looking, integrated manner to optimise economic returns and tax outcomes. Our client is a truly diversified investor of significant wealth, which has been carefully planned for the next generation and beyond.

"The advice, oversight and counsel I have received over many, many years has been nothing short of professional and prudent. Their advice has always been wise, expert, well considered and with my best interests in mind. Of paramount importance to me is that all my wealth is properly integrated and managed, and the stewardship provided by Cameron Harrison gives me complete confidence and comfort that this will continue for my family after I have passed."

Retired business owner/Commercial Property owner and client of Cameron Harrison since 2012 (and of our partner's since 1986).

Invest for peace of mind.

Cameron Harrison is an Asset Management and Wealth Advice firm forged on independence in form, substance and thought.

Cameron Harrison provides investment management and advisory services through two business divisions: Cameron Harrison Asset Management (CHAM) and Cameron Harrison Private (CHP). Our Partners and staff own the firm – meaning our clients always get informed and refreshingly different perspectives, focusing on 'Investing for Peace of Mind.'

Our expert portfolio managers have over 20 years of collaborative investing experience and the skills to guide investments in domestic and international equities, fixed income and multi-asset class strategies. And we're flexible, providing strategic and technical advice to business owners, individual investors and family groups.

Cameron Harrison is driven by excellence, distinguished by thought and dedicated to client success.

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As trusted advisors to our client, Cameron Harrison has played an active role in our client's property development ventures including the management, counsel and financial assessment of these projects.

Our client has sought to 'unwind' some of his larger property investments in contemplation of the transfer of wealth to future generations. Here our strategic advice framework and management of the strategy has been applied to the client's property interests, with development permits sought and several sites sold at significantly increased valuations under our management and oversight.

PEACE OF MIND

Our client was initially referred to one of our Senior Partners, and now some 30 years later, is one of our longest standing client relationships. Through the strength of the relationship developed over many decades, our client considers that Senior Partner a friend and trusted adviser on many life aspects, not just the professional. Whilst the management of the relationship has now succeeded to younger Partners within the business, the original relationship partner continues to be engaged in our business as a consultant.

Our client has a particular desire to leave a long-lasting legacy to future generations which has been carefully planned for through our partner's "Intergenerational Wealth Transfer Framework," having regard to asset protection, tax effectiveness and economic management. Our framework has delivered to our client the ***peace of mind*** he wanted for his legacy.

SERVICES PROVIDED

Through the course of our ongoing engagement Cameron Harrison has provided the following services: