



## Client Case Study: Success Driven by Dynamic Strategy

Successful business owners have unique drive and determination; they see opportunity in disruption and have the ability to adapt and succeed where big business can't. They also know that the calculated planning required to grow and remain nimble needs specialist advice; not just for their active business interests but their passive investments as well. With the assistance of an integrated client service team, our client was able to seamlessly carry out their strategic plan and achieve **peace of mind** and still drive success.

As an experienced publisher with over 25 years in the business, our client started her career with a large publishing house. In the 1990's, she recognised the industry was starting to shift to benefit smaller, more nimble firms which could adapt more effectively to the market's needs. Seizing the opportunity, she set up her own publishing firm with her husband, establishing operations domestically and within North America specialising in innovative programs in the education sector.

Our client came to our partner 15 years ago. Her husband and business partner had passed away and she was in need of strategic foundation for the wealth generated from their thriving publishing business.

Knowing, as a business owner, she would require an integrated approach, our client sought the advice from the friend of her late husband, a successful business owner himself. He referred her to our senior partner and one of his trusted advisors.

“I consider myself fortunate to have had not only leading advice over the last 15 years, but that it is so seamlessly integrated. The partners and team at Cameron Harrison have a unique understanding of business owner DNA – over 40 years of experience and expertise combined with dynamic deployment and development of their people.”

Business Owner, publisher and client of Cameron Harrison since 2012 (and senior Partner since 2001)

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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## THE CH PROCESS

A careful planner, our client understands the benefit of having a strategy and regularly recalibrating it. Through our partners' strategic advice framework our client identified the need for an integrated wealth structure – that is, business planning integrated with tax effective management of the passive wealth investments for retirement income.

The CH process benefits clients across planning, tax, accounting, structuring and the management of passive investment wealth. We have worked closely with the client's long standing tax and accounting advisor over this period to deliver a team result for the client.

## PEACE OF MIND

With a sound and comprehensive strategic plan, our client was able to grow from a small publishing firm, to a nimble leader in an evolving market, capitalising on the emerging trends in educational publishing where others have floundered.

Today, our client has been joined by her two children in running the publishing firm but her drive for success remains. She continues to engage with Cameron Harrison, in conjunction with her trusted accountant, to receive trusted counsel for the long term success of her publishing business. Our client has maintained this relationship structure from 2001 to the present day.

Our client knows she has the support of an expert and well-resourced team to deliver **peace of mind** for future success.

## SERVICES PROVIDED

Through the course of our on-going engagement, Cameron Harrison has provided the following services:



**Strategic Business Owner Plan**



**Trusted Counsel**



**Investment Management**



**SMSF Tax, Accounting and Audit Compliance**

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