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# Client Case Study: Supporting an Executive through to Worldwide CEO and Beyond

The career progression of a CEO doesn't end once they have reached the corner office. The transition and readjustment to post-Executive life commands equally as much focus, determination and planning as the road to the top. Similarly, the trusted counsel and advisors that assisted along the way need to be able to provide dependable service to see them through a second career of non-executive director appointments. With the continuous support of a client management team, our client was able to have the **peace of mind** to realise his long term objectives.

Over 30 years ago, our client was well on his way in his executive-level career. About to be promoted and transferred overseas to head the North American subsidiary of a top 100 ASX-listed company, his immediate needs were around proper tax and asset protection advice before taking on his new role.

A planner by nature, our client realised he didn't just need advice for his imminent move abroad; he had the foresight to acknowledge that he would need trusted, independent advice and counsel throughout his executive level career to see him through his CEO career aspirations and beyond.

He decided to use this opportunity to start building the team of trusted advisors to support him and his career each step of the way. He required these advisors to work seamlessly and provide him with the knowledge and insights that would see him through all of the opportunities and challenges before him.

*“The folks at Cameron Harrison and their senior partners have provided strategic continuity in my affairs for over 30 years. The fact that my wife and I now deal with the next generation of directors and partners highlights their strength of culture, adaptability and focus on developing the best people. We as clients all get older, but Cameron Harrison provides me with the dynamic people to guide and assist me for a long time to come.”*

Retired ASX 100 CEO and client of  
Cameron Harrison since 2012  
(and of senior partners since 1988)

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.



Level 3, 90 Collins Street  
Melbourne, Victoria 3000



GPO Box 1559  
Melbourne, Victoria 3001



+613 9655 5000



[cameronharrison.com.au](http://cameronharrison.com.au)

## THE CH PROCESS

As a Senior Executive of a large company, our client’s primary focus and strategic objective was to navigate the complexity of taxation, together with appropriate asset protection and wealth accumulation structuring advice to minimise the risk exposure posed by such a significant and public role. Working with our senior consultant, then a Partner, our client was able to address his immediate concerns.

Over the long-term, the career of a world class CEO inevitability needs to be planned with retirement and a second career involving non-executive directorships. With appropriate formal planning years before retirement, the various strategies and alternatives were considered and agreed with the help of his client management team. When formal retirement occurred and non-executive directorship appointments confirmed, our client was able to effortlessly transition to his new lifestyle.

## PEACE OF MIND

With a sound and comprehensive plan, our client was able to put in place a number of sophisticated wealth accumulation and protection strategies that achieved his three core objectives – tax effectiveness, asset protection and proper economic management of capital. These arrangements have allowed our client to progress from worldwide CEO to multiple non-executive directorships with relative ease.

Equally as important to delivering peace of mind for this client was the support of an expert and well-resourced team to intimately oversee and guide his affairs. In conjunction with a trusted legal advisor, our client has maintained this relationship structure to this day, albeit with younger partners of each firm now responsible.

Today, our client has a retired lifestyle which sees his family travel frequently, but the structures and good practices adopted in his working career remain. He places significant responsibility in Cameron Harrison, particularly with management of his family’s passive investment wealth.

## SERVICES PROVIDED

Through the course of our ongoing engagement with this client, the services Cameron Harrison have provided are:

- Investment Management – managing a passive wealth pool within the “CH Economically Responsible Multi-Asset Class Strategy”
- Family Wealth Succession and Estate plan
- Tax and Asset Protection advice
- Trusted counsel
- SMSF tax, accounting and audit compliance

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