



CAMERON
HARRISON

Client Case Study: Strategic Advice & Investment Management ... A Whole Business Life Cycle

Business owners put their livelihood into building and maintaining their businesses. So the wealth the business generates requires specialist advice, not just for the active business interests but the passive and lifestyle investments as well. With the assistance of an expert client service team, our client was able to seamlessly blend their business wealth and achieve **peace of mind** in their post business passive investment pool.

With a keen eye when it comes to innovative building and construction products, our client has established many successful businesses within the industry. His success has come from his ability to see the big picture and the need for continuous improvement.

When our client was looking to buy equity in his first business venture 35 years ago, he recognised the benefit of seeking out external advice and solutions. He was the master of his product, and in the same way the success of his business depended on his unique product expertise, he needed financial experts to support the business structure, strategy and operation.

Our client understands the unique need for integrated advice across his business activities; active business interests integrated with passive wealth strategy. With this in mind, he was referred to one of our senior partners for advice on the orderly transfer of business profits into long-term wealth accumulation vehicles and strategies.

“Starting with a choice referral many years ago when I first decided to venture into business, the partners at Cameron Harrison have astutely guided and assisted me over what has been a rewarding and satisfying business journey. There is nothing needlessly gratuitous in their approach or advice – it is always highly considered and carefully thought-out. They perform various roles for me, from advice to comprehensively managing our passive wealth strategy.”

Business Owner, building product wholesaler and client of Cameron Harrison since 2012 (and senior Partner 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.

THE CH PROCESS

Relying on the counsel of his Cameron Harrison client management team, our client put in place and continues to operate a progressive and reiterative extraction process over his 35-year business journey to gradually unlock and 'de-risk' capital. Together with continual and substantive forward-planning, the overriding objective for our client was to build a sufficient retirement pool.

While a number of legal entities have been established over the years, our strategies have resulted in seamless optimisation of after-tax investment returns and capital growth.

PEACE OF MIND

Recognising the strategic benefit of accumulating wealth independent of business risk has been at the core of our advice to business owners for many decades. More importantly, it is how these two wealth pools - active and passive - integrate with each client that determines overall financial success. Cameron Harrison adopts a three-pronged approach to this: tax effectiveness, asset protection and sound economic management of capital.

Our client was a very early supporter of this approach and understood the long-term benefits. Alongside the sophisticated business advisory services provided, the application of our investment partners' economically responsible investment management approach to this passive asset pool has provided our client with peace of mind in their retirement income needs.

SERVICES PROVIDED

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



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