



Family Businesses

Sarah's story

“My husband Alan founded our business in 2004. He is completely focused on the development & delivery side so it is up to me to make things happen to support him & our growing team of practitioners.

Because Alan is often away on business I tend to handle the family finances as well as overseeing many of the financial and administrative aspects of the business. We have four children, one with special needs.

I was after some extra help & our accountant put us in touch with Grosvenor Birch. At our first meeting with Elaine, we discussed our plans for the business and our unique family issues.



We didn't have time to focus on ourselves

Whilst we were concentrating on setting and achieving our business goals we had never thought about on how the business could help us achieve our family goals. There just never seemed to be enough time to deal with planning our own affairs.

After listening to us talk about our family and our business Elaine produced a plan including 6 specific goals. They were laid out in a simple manner and in order of priority with key points on what we needed to do to achieve each goal.

Family security

I was surprised at how quickly we surpassed our first goal by repaying the money we had borrowed to set up our business. Since then we have extended our home to adapt it to suit our family without needing to borrow anything.

Elaine has helped us to protect the family finances by putting our life insurance in trust. This was a simple idea that had been completely overlooked before.

With us all the way

Our Business is doing really well and we are fast running out of space but we know we are in a good place if we decide to buy a headquarters building. Grosvenor Birch have given us a backup plan by creating a small self-administered pension & we are already saving tax.

Some of the original goals are still work in progress and we may add in some new ones as our lives change!”

Sarah Watkins
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