

Financials Investment Business Case Study

The following slide outlines a case of young businessman who contacted financial advisors for assistance in decisions related to fund investment. This case covers the main requirement of entrepreneur and the solutions provided by the finance advisory firm.



Requirements

- Young entrepreneur wanted assistance from financial advisors for
 - Investment in tax efficient manner
 - Keyman insurance and investment account for company
 - Cashflow modelling
- Add text here



Solution

- Financial advisors Assisted in adopting ISA that provides return of 30% in 4 years
- Assisted in cash flow forecasting
- Add text here



Results

- Higher returns in investment made by 30%
- Cashflow forecasting mitigate financial risks by 20%
- Add text here

Investment Case Studies

H Kauffman



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