



**RESOURCES
UNEARTHED**

Case Study

What Did We Want? The Freedom to DO What We Choose

For 30 years, my client worked around the world in executive operation roles for a major mining company. There were multiple issues relating to complex executive options and share plans in a variety of structures and across a variety of taxation jurisdictions.

The consequences of these had become bewildering. My client and his wife had accumulated property and superannuation in a number of different locations. They engaged me, Brett Cribb, for much-needed assistance.

Client: "Brett liaised with a variety of organisations to coordinate a response and plan for our complex salary packaging and employee share structures, to ensure we received the right advice at the right time. He understands the implications, and can create planning strategies which minimise taxation impacts and maximise our long-term wealth accumulation and retirement planning. We were even able to implement structures which ensured our downside was protected and our retirement goals were ensured."

My client also received a severance package offer, and needed 'sounding board' assistance when deciding whether to accept.

Client: "Brett identified further ways to maximise our wealth and minimise tax on the severance package."

We worked with a range of professionals on our clients' behalf to create a coordinated approach to delivering outcomes. While remaining your first professional contact, and 'the hub of the wheel', we provide well qualified referrals to accountants and legal professionals who care about achieving outcomes and are capable of developing an excellent understanding of your complex requirements.

Client: "Brett worked with, and coordinated a range of advisers to ensure our overall situation was improved and hassle free."

Our clients are often located in remote or overseas locations, we use advanced technologies to enable world-wide communication, when face-to-face meetings are not possible.

Client: "Brett made our whole situation simple by staying in regular communication with us, explaining and tracking my complex executive salary packaging structures."