

The Holborn Six Step Process

We use the 'Holborn Six Step Process' to educate and inform, the results of which are designed to help you to maximise the opportunities and tax breaks available to you. All of this means you can stay focused on your business whilst mitigating the risks along the way while your stated aims and objectives are achieved.

1 Introduction - is there a mutual benefit to us proceeding to Stage 2. Are you the kind of client we currently deal with; do you have issues & concerns with which Holborn are familiar?

2 Discovery - in order to assist we need to know as much about you as you do. We will look at where you are; where you want to go; what you have done so far - essentially a comprehensive review of your current arrangements.

3 Initial Recommendations - we will provide you with a written Plan. It will give you a clear understanding of your current financial position and it offers a specific course of action to help you to achieve your stated aims & objectives.

4 Checkpoint Action - we will discuss your Plan step by step. Thereafter it is time for you to decide whether to implement the Plan's recommendations.

5 Implementation - putting your Plan into action. If you decide to implement the Plan's recommendations we will begin the process of implementing the actions agreed.

6 Review - to ensure that by a regular system of review meetings your stated aims and objectives are achieved. Consequently we recommend we should always meet at least annually to review & re-assess the basis of previous decisions.

