

Your Guide to

Retirement Planning



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MILSTED
LANGDON

Chartered Accountants

Planning Checklist

Why not complete this checklist, and then make arrangements to discuss your retirement plans with us? We can use this as a starting point, to help you create a strategy to realise your retirement aspirations.

Do you have a retirement plan in place?

- Yes (date last reviewed: _____)
- No, but I would like to develop one

My primary retirement goals are to:

- Live independently where I want
- Travel frequently
- Buy and enjoy the things I want
- Minimise taxes
- Help my children and their heirs
- Pursue hobbies and interests

Other _____

My current retirement resources include:

- Pension plans
- ISAs, stocks and shares
- Insurance policies
- Savings
- Art, collections and other valuables

Other assets _____

I need help with:

Our Services

- Business Planning**
- Business start-up planning and advice
 - Strategic and business planning
 - Financial management
 - Financial information systems
 - Computer systems advice
- Taxation Advice**
- Self assessment
 - Personal tax
 - Business tax
 - Company tax
 - Capital gains tax
 - Inheritance tax
 - HM Revenue and Customs investigations
 - Value Added Tax
 - PAYE and national insurance compliance
- Accounting**
- Preparation of annual accounts
 - Preparation of periodic management accounts
 - Book-keeping services
 - Maintaining PAYE and VAT records and associated returns
- Company Secretarial**
- Preparation and filing of statutory returns
 - Preparation of minutes and resolutions
 - Company formation
 - Company searches

This guide is for general information only. No responsibility is taken for any action taken or refrained from in consequence of its contents. Always seek professional advice before acting.

Please contact us for further information

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