



**Will you realise the true  
value of the assets  
you have created?**

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# Your **Succession** **Planning** Team

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**Maura Duffy**  
BComm FCA

A Fellow of the Institute of Chartered Accountants in Ireland, Maura has over twenty-five years practice experience.

Maura's clients range from large corporates to private individuals, professionals, small and medium companies and groups across a number of sectors.

In addition Maura acts as mentor to many indigenous enterprises for the management and development of their business focusing on company profitability and growth. Many of Maura's clients have investments and business interests across a variety of sectors, which include professional services, retail, property investment, licensed trade, agriculture and private clients.



**Bruce Stanley**  
FCA, AITI CTA

A Fellow of Chartered Accountants Ireland and an AITI Chartered Tax Advisor, CTA, Bruce has over 15 years' experience in practice. Bruce has experience across all tax heads, specialising in corporate structuring for international business entrepreneurs and owner managed businesses. Bruce has a strong client focus providing bespoke commercial tax solutions in areas such as business expansion, efficient cash extraction, employee incentivisation schemes and succession planning.

Bruce has presented on a variety of taxation matters both in Ireland and at European conferences on topics such as EU VAT case law, the Irish Holding Company regime, personal tax planning and tax efficient business investment.

# Let us make the following **assumptions**

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**1**

**At some point in the future you will retire and you would like to extract the maximum value from your business.**

**2**

**You would like to pay the least amount tax on that payout.**

You need to have a plan in place early on to achieve your long term goals. One of the lessons we quickly learn in our business life, if we are to be successful, is to make the right decisions and to act immediately.

Many people rely solely on the strategy of Pension Funding for their future, without realising that with the right planning their retirement pot could be far more valuable.

Let me give you just **one** example;

**Retirement Relief** - as a business owner aged over 55 you can access €750,000 tax free based on certain conditions.

We have seen cases where a company is run by a married couple who are both over the age of 55 but only one of them is actually a shareholder. This means that another €750,000 is being lost because of a minor detail. Could this be you?

No business person wants to see huge amounts of money disappear because of poor planning and then spend the rest of their life regretting it.

Put this important issue on your 'to do list' today and give Maura or Bruce a call. A short meeting could make all of the difference to your future peace of mind.

# Financial Experts in **Succession Planning**

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HLB Sheehan Quinn is a market leading business advisory firm. To ambitious organisations and individuals looking to grow and innovate, HLB Sheehan Quinn is your ideal tax and advisory partner.



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