



SOPHER+CO

Chartered Accountants

THE PRIVATE OFFICE



# PRESERVING WEALTH & ACHIEVING GROWTH



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The Private Office at Sopher + Co launched in 2020 to provide clients with additional services that complement our current Tax, Audit & Accounts offerings.

These services can be tailored to your individual or business needs, ensuring you are covered and prepared for all eventualities.

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# FINANCIAL MANAGEMENT

## ACROSS THE BOARD

Our team work with you to ensure you are on top of your finances by creating a Net Worth Statement, providing a full picture of your assets and liabilities; enabling you to make key decisions.

Other services include: completing an overview of historic or future spending, dealing with the management of bill payments or creating a cash flow to ensure you are on top of future payments.

- Net Worth Statement
- Personal Cash Flow
- Overview of Historic Spending
- Review of Future Spending
- Manage Running of Expenses & Bills Payable





# WILLS & LPAs

Recent research suggests that over 54% of UK adults don't have a Will in place. This means common law will determine what happens to their estate, potentially exposing their families to costly legal battles and uncertainty.

Our team can work with you to ensure you have a Will in place that takes into consideration both your financial and personal wishes. We can also help you create LPA's for both your medical and financial interests.

We can assist with:

- Will Writing
- Letter of Wishes
- Lasting Power of Attorney



# HR

## DUTIES & COMPLIANCE

Employment legislation is constantly changing. Therefore, as an employer you have a duty of care to your employees to ensure that your processes and paperwork are updated accordingly.

Whether you employ domestic staff for your household, run a small business or a larger organisation, the questions are still the same:

- Are your contracts up to date?
- Do you offer a pension scheme?
- Are you GDPR compliant?
- Have you made the appropriate 'Right to Work' checks on your staff?

We are also able to advise on staff restructuring.







# INSURANCE

You'll never discover you are under-insured until you make a claim. Our Sopher Plus offering sees us partner with Tysers - a leading insurance broker - so you can rest assured that the appropriate protection will be provided.

Valuations are available as well as a comprehensive review of your current arrangements. The wider insurance market will be undertaken to ensure you achieve best value in terms of both cover and price.

- Personal Insurances: for High and Ultra-High-Net-Worth Individuals
- Business Insurances: for Sole Traders, and SMEs and global organisations
- Entertainment Insurances: for Productions and Venues
- Sport Insurances: for professional sports people and associations, teams, clubs and events

Sopher + Co. is an appointed representative of Tysers Insurance Brokers Limited. Tysers Insurance Brokers Limited is authorised and regulated by the Financial Conduct Authority under reference 305496.

# PERSONAL ASSISTANTS

## ON-SITE OR VIRTUAL

We can offer you the services of one of our highly trained Personal Assistants - either virtually or on location.

The Private Office Personal Assistants can help with everything from organising events and staff recruitment to looking after all household and property needs – including house moves.

The Personal Assistants can (typically) take responsibility for travel arrangements, home filing, email organisation and diary management.

Charged on a retainer or an hourly fee basis, our Personal Assistants can link into our other offerings at Sopher + Co (including Financial Management & Insurance) as a single point of contact for all your Private Office needs - leaving you free to focus on more important matters.

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# SOPHER+CO

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