



THE CASE OF 'HOW MUCH IS ENOUGH?'

Neil & Sue worked hard, very hard. And they created a good lifestyle for themselves and their daughters Rebecca and Lucy.

Neil was 45 and he had a plan -his own plan. You see Neil had three pet hates. His mortgage, pensions and, most of all, financial advisers. So Neil's plan was simple -to pay off his mortgage as quickly as possible, then, mortgage free, accumulate as much as possible via his business between 45 and 55 so he could retire early.

Simple. Neil had it all figured out, so he didn't need any 'advice'. His accountant, however, suggested he speak with Henwood Court.

Despite Neil's reluctance, he agreed. Henwood Court spent some time getting to know them, then they helped them define the real lifestyle they wanted to enjoy throughout their life. They also wanted to understand why '55' was so important to him.

Neil wanted to escape at age 55 and pursue his passion of sailing whilst he was still young enough, and fit enough to participate in it. He wanted to cruise the Med. He wanted to cross an ocean. Any ocean. Neil wanted to see the world. He wanted to 'do stuff'!

But why was 55 so important?

Neil shared with Henwood Court the fact that his father had worked his whole life, right through to age 65, only to drop down dead at age 67. That was Neil's motivation. He could not bear the thought of that happening to him. He knew -and understood -that 'Life is NOT a rehearsal' and Neil lived it accordingly.

So Henwood Court worked with Neil and Sue to calculate their number – the amount of money they needed by age 55 to live the life they wanted -without fear of ever running out.

Henwood Court built in the cost of continuing private education for Rebecca and Lucy, plus the cost of their weddings. They got Neil & Sue to really think about the lifestyle they wanted at various stages of their lives.

And then they crunched their number. This revealed that Neil & Sue's current plan - Neil's plan - would see them running out of money by age 67!

Henwood Court then helped Neil & Sue to understand just HOW MUCH they needed to accumulate by age 55 in order to prevent this serious miscalculation.

It was a BIG NUMBER.





THE CASE OF 'HOW MUCH IS ENOUGH?' continued

So Henwood Court then worked with Neil & Sue to help find ways of accumulating the money, including how they could utilise their greatest asset (their business) to build their number.

Neil & Sue are now well on course, with a plan that's properly quantified. Neil now has a reason to work hard a 'WHY'. He's motivated, inspired and focused.

They continue to work with Henwood Court on an annual basis to ensure they stay on track. For Neil & Sue Henwood Court play various roles; that of a planner, mentor and coach. They inspire, guide and coax them to ensure they get to where they want to go.

And that's easy to do – when you know your number.

It pays to know your number!

For further information please call 0845 0551970 or go to www.henwoodcourt.com

