

Corporate Financial Planning



We provide expert advice and guidance to businesses at every stage, from startups to established companies seeking growth through organic expansion, acquisitions or mergers, all the way to sale.

By working closely with corporate lawyers and accountants, we take a collaborative approach to achieve the best outcomes.

Seeking advice before a transaction is key, as it ensures all options remain available, whereas post-transaction, planning opportunities may be more limited.

Your Business

If you're looking to protect your assets—whether it's your staff, machinery, or premises, we're here to help.

Our expertise includes key person insurance and shareholder protection, ensuring your business can continue operating smoothly.

Your People

Employee Benefits:

Let us help you build a benefits strategy that works for your business and your people, aligning packages with your responsibilities, regulatory requirements, and company culture.

We provide expert guidance on:

- **Protection:** Life cover, sickness protection, critical illness, and healthcare.
- **Pensions:** GPPP, SIPP, and SSAS for traditional investments or property purchases.
- **Salary Sacrifice:** Maximising tax efficiency for both employers and employees.
- **Cash Management:** Optimising cash reserves while ensuring FSCS protection for your capital.

Our Approach

Stage 1: Audit & Assessment

We start by reviewing your existing employee benefits and comparing them to what you believe is in place – often uncovering gaps.

We take the time to understand your company culture, growth plans, and how benefits should align with business expansion to support staff retention and protect the business, all within your budget. **Our initial consultation is always free and without obligation.**

Stage 2: Strategic Alignment

We help you optimise group benefits in line with year – end planning, assess the value of key personnel, and ensure your benefits strategy evolves with business growth while staying compliant with employer responsibilities.

Stage 3: Ongoing Implementation & Review

We put a corporate financial planning strategy in place that runs alongside your business and review it at least annually to ensure it remains effective and aligned with your objectives.



Stuart Doughty

Director & Head of
Corporate Financial Planning

Stuart co-founded Centurion in 2010 and, as a business owner himself, deeply understands the challenges and opportunities that come with running a company, and succession planning.

With over 20 years of experience, Stuart has worked closely with owner-managers and HR / Finance teams in larger organisations.

His journey began by advising board members as private clients, which naturally led to applying the same professional, strategic approach to their businesses.

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Sean McCabe

Chartered
Financial Planner

Sean is a Chartered Financial Planner who has worked in finance since 1988.

He advises companies on their staff benefits, employees on their pension and retirement planning, business owners on protecting themselves, their family and their businesses.

Sean also supports business owners with their retirement and exit strategies.

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Matt Dixey

Financial
Planner

Matt is passionate for helping business owners and is dedicated to helping entrepreneurs navigate the complexities of financial planning using growth and exit strategies.

He has a commitment to see businesses thrive, ensuring clients have financial clarity and confidence at their various stages of development.

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Centurion's Corporate Financial Planning Team are here to help.
Contact us today by calling **0117 332 8200**, email enquiries@centurioncfp.co.uk or email a member of the team.