



## Partial Management Buy In

Our clients, Cairn Independent Limited with roots dating back to 1986, trades as financial life time planners, specialising in personal and business life planning throughout Central Scotland. They were to undertake a restructure of their shareholders and required expert advice. Due to the regulatory environment that the company traded in, it is vital to ensure the company remained compliant now, and in the future.

EQ Corporate Finance and EQ Taxation were brought in by the client to provide shareholder support during their restructure, allowing the retirement of the director and shareholder to meet the requirements of the seller, the company and any potential new directors/shareholders.

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### The Transaction

With an engaged management team, EQ were able to discuss how a transaction could be structured to benefit all participants, how it could be funded and would impact the company's financial statements.

EQ was tasked with brokering a deal to buy out a retiring shareholder, to safe guard the future of The company. However, the client needed to bring forward the next generation of financial advisors. In order to appease all parties involved, the proposed transaction needed to be effective from a cash flow and tax perspective.

After completion of the restructure, the departing shareholder was able to enjoy the built up capital and the new entrants are now motivated to take the company forward and grow their investment.



For more details on this transaction or to speak to someone about how we can assist you, please contact:

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Or call your local office using the numbers below.