

Clearer Decisions. Better Capital Planning..

Business Capital & Financial Services Coordination

Understand obligations. Protect liquidity. Evaluate opportunities..

Helping Business Owners Make Informed Decisions.

A proposed gateway to independent financial service providers.

Clarity on roles. Transparency on costs.
Informed decisions..

Profit Is Not the Same as Available Cash.

Plan for operating costs, tax, debt and growth.
Only genuinely surplus capital should be considered for trading.



A Clear Role. A Structured Relationship..

Business discussion

Provider information

Onboarding coordination

Ongoing review

Proposed services subject to agreement and applicable permissions..

Understand the Process Before You Commit.

Assess your business needs.

Check providers and agreements.

Open and fund your own broker account.

Document authority and review activity.

Your Account. Clearly Defined Authority.

Verify who holds funds and who can trade.

Understand reporting and withdrawal conditions.

Account ownership does not eliminate
investment risk..

Define Risk Before Allocating Capital.

Set allocation limits.

Understand the strategy.

Agree loss-review triggers.

Protect essential liquidity.

Understand Performance. Know Every Fee.

Review results after all relevant charges.

Check broker costs, management fees
and referral arrangements.

Past performance does not predict future returns.

Tax Planning and Investing Are Separate Decisions.

Investing does not automatically reduce taxable profit.

Keep tax reserves available.

Obtain independent advice for your jurisdiction.

Is Your Business Financially Ready?

- Surplus capital after obligations
- Ability to absorb losses
- Clear internal oversight
- Independent professional advice

Trading should not fund urgent commitments.



Ask the Questions That Matter.

Who holds the funds?

Who can trade?

What are the fees?

How do withdrawals work?

What could we lose?



Start with Clarity.

Understand your obligations.
Review your available capital.
Explore your options responsibly.

Start Your Business Capital Review.

