

## Case Study

Dr Mamdouh  
Sutton Coldfield  
June 2024



**KS WEALTH**  
INDEPENDENT FINANCIAL ADVISORS

“His transparency about his services, fees, and plans gave us a clear understanding and confidence in our financial future.”

### Background

Dr Mamdouh Youssef is an experienced NHS consultant with a private practice, who sought KS Wealth IFA's expertise to plan for his family's financial future.

It was important to Mamdouh that we implemented a strategic approach to manage his finances, establish trusts, and set up pensions that would safeguard his wealth for his family in generations to come. Specifically, Mamdouh was looking for pension options that would save on income, corporation and inheritance tax.

Additionally, he wanted advice about money sitting in a Private Practice Ltd company that was earning very little interest.

“Kris came to speak to me and my wife about planning before the pandemic. He looked at our finances and helped us set up investment plans and trusts for our children.”

### What we did

We provided comprehensive financial planning services, including setting up a financial investment plan and a Trust to protect the family's wealth.

We also helped Mamdouh utilise reserve funds to build a pension pot under new regulations, ensuring future benefits for his children and tax savings.

### Feedback

Mamdouh and his family now have a secure financial future, with clear plans for preserving their wealth.

Our open and detailed approach provided confidence and peace of mind, ensuring long-term security and legacy preservation.

“Kris explained everything clearly, putting all the advantages and disadvantages in writing.”

### Client Profile

Client name: Dr Mamdouh Youssef

Client industry: Consultant anaesthetist and private practice owner

Years as a client of KS Wealth: 6 years

Three main areas of support:

1. NHS pension options and advice
2. Corporate investments via client's limited company
3. Family succession planning (inheritance tax planning)



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