

# Business Advisory & Mentoring



“Whether you're setting up a new business, looking to expand your operations or plan for succession our expert advisors will tailor a solution that's right for you and your business”

Our business clients have the opportunity to benefit from our support to make the most informed decisions. We provide business owners with a range of services and support that focus on building a mentoring relationship. Close working relationships with our experienced Advisors help us gain an understanding of you and your business.

Our services help business owners address issues and challenges as they arise and plan for improved operations and financial results in the future.

To enable you to make the most informed decisions possible, we focus on:

- Ensuring your personal and business goals are clearly defined
- Working together to plan and implement actions to achieve set goals
- Establish a mentoring relationship and provide support with regular contact.

We work with business owners and businesses at the various stages of the business life cycle.

## Start-ups

Take the opportunity to get the business setup correctly from the start, and avoid making costly mistakes that have to be undone at a later stage.

We can guide you through all the key elements of this journey, starting from helping you to plan and develop your initial business concept through to all the compliance and planning steps to having your business open for trading.

## Established

Often business owners are looking for greater returns, more support or inspiration for the future.

We understand it can be a lonely journey at times as a business owner, especially in SMEs, so our proactive and structured support can give both the business and the owner the boost and focus needed to go to the next level.



## Business Advisory & Mentoring



### Exit-focused

A key part of the business life cycle that is often neglected until it is too late is how to best exit the business. We want you to maximise the return on all your years of hard work and ensure your personal wealth and financial future are optimised.

We can help determine what your business is realistically worth, and how you can work towards a positive exit outcome. We seek to proactively start work on your succession and exit planning as part of your goal setting many years ahead of your planned departure.

*We offer an initial complimentary introduction meeting with one of our experienced Advisors. This gives you the opportunity to learn more about what services we offer and an understanding of our style of building close working relationships.*

### Services we offer

- Management reporting & analysis
- Budgeting and forecasting
- Financial analysis – cost/margins, cash flow
- Tax planning
- Tax advice
- Business structures
- Asset structures
- Bookkeeping support
- Business appraisals
- Due Diligence
- Business plan
- Succession planning/ Business sale
- Business grants
- Business coaching
- Software solutions including the latest cloud technology

