

EvansEntwistle

CHARTERED MANAGEMENT ACCOUNTANTS & TAX ADVISORS

Accountancy | Corporate Finance | Taxation | Business Advisory | Private Clients





EvansEntwis

Much more than just the numbers...

Established in 2013, Evans Entwistle is a team of chartered management accounting, financial accounting and business advisory professionals who work together seamlessly to deliver a wide range of complementary accounting and taxation services.

In today's economic climate, we recognise that our clients need far more than just year-end accounts preparation. That's why we take the time to understand your situation and offer a full range of support, tailored to your individual needs. Our partners have all attained Chartered Status, which requires not only professional qualifications but

also years of hands-on experience in delivering sound business advice to enable clients to strengthen and grow their organisations. Our team across our three South Wales and South West regional offices has broad experience across diverse industry sectors – including public, private and NFP/charities – and across all business sizes, from FTSE100 companies to SMEs.

Whether you are a private or commercial client – and whatever stage of life or business you are at – we're here to listen and advise, and to build a long term relationship with you.

We offer:

- Proactive advice by CIMA Chartered Management Accountants and ACCA Chartered Certified Accountants
- A proven track record in minimising tax liabilities and maximising profitability
- A strong emphasis on client communications
- A "Plain English" approach to explaining financial information
- Free no obligation initial fact-finding consultation



Accountancy

Managing a business can be time-consuming and all that “red tape” can be complex. Whether you are a sole trader, partnership or limited company, we will help to address your administrative burden.

CIMA Chartered Management Accountants undergo specialist training in the provision of management accounts and are able to provide you with a unique insight into your business – not just at year end, but whenever you require advice to better understand your current situation and to clearly map out your future. We make sure that we understand your business fully so that we can give you the most appropriate tailored advice to suit your needs. We'll then keep you informed of your statutory deadlines via post and email reminders – but putting together the accounts is just the first step.

Management accountants delve deeper behind the numbers. We work with you to review the figures, identifying the key business indicators that will give you a better insight into the

business, and then use them to help you successfully control your operations. Only if you understand the figures can you really understand your business, its processes and its legal and fiscal obligations

We offer a full range of complementary accountancy services to enable start-ups and established businesses of all sizes and sectors to strengthen and grow, including:

- company incorporations
- company secretarial services
- book-keeping
- accounts preparation
- provision of management accounts
- budgeting & forecasting
- cashflow management
- payroll bureau



Corporate Clients

Taxation

Tax can be a minefield for those not in the know. A typical business will be liable for PAYE, VAT and either corporation or income tax, as well as being potentially subject to industry specific regimes.

We firmly believe in robust tax planning to minimise your exposure and maximise your cash flow position, whilst satisfying your statutory obligations on time - thus avoiding penalties, surcharges and interest. We strongly feel that a solution that works advantageously for one client may not do so for others and so we treat each client and business as an individual.

We'll carry out a free no obligation initial review of your taxation situation to establish whether any areas of complexity exist which may have resulted in an under or over payment of tax, and advise whether a full review may prove beneficial in a bid to reduce your tax burden. We'll also be on hand in the event of a tax investigation, mitigating the impact on your business by dealing directly with HMRC on your behalf.

Our tax expertise spans:

- VAT
- Corporation tax
- Self assessment income tax
- Construction Industry Scheme (CIS)
- Inheritance tax
- Capital gains tax
- R&D tax credits

Corporate Finance

Whether you are a new start or a mature company, having the right finance in place is vital. We undertake feasibility studies, determine the most appropriate source of finance, prepare detailed business plans and forecasts and, if you so wish, present your proposal to your chosen funding provider(s). We have extensive experience of working with major UK banks, private investors and venture capitalist houses such as Development Bank Wales, and also have a successful track record in securing grant funding from public sector sources.

Unlike many accountants, our CIMA Chartered Management Accountants and CIM Chartered Marketers also have many years experience of working on the commercial side of the fence and as such are well placed to advise on all aspects of corporate finance, including:

- raising commercial finance
- commercial due diligence
- company valuations
- business acquisitions
- MBOs and MBIs
- business restructuring
- mergers and demergers
- business disposals & exit planning

Business Advisory

Every organisation needs a vision – and a strategy to deliver that vision – and we can help you to chart your future and make your plans a reality. From brainstorming workshops to gather your thoughts through to the development of a realistic and achievable strategic plan and onwards towards detailed execution, ongoing evaluation and continuous improvement, we assist your business at each and every stage.

The scope of our business advisory work includes:

- business planning & forecasting
- business development & growth projects
- business improvement initiatives
- project management support

Investments

We work with a portfolio of trusted Independent Financial Advisors to deliver personal and corporate investment advice, from mortgages to pensions, trust funds, investment vehicles and insurance products.

**For a free no obligation consultation, contact us on
029 2071 3800 (Penarth) / 0117 9247 767 (Bristol) /
01633 250 530 (Newport)**



Private Clients

We pride ourselves on offering a personal and bespoke service to our private clients via a comprehensive portfolio of financial planning, personal taxation and wealth management advice. Whatever your goals and aspirations, and whatever your life stage, we will work with you to ensure that you are maximising your wealth position and minimising your tax obligations.

Wealth Management

Wealth management is not just for high net worth individuals – good financial & taxation planning is important for all, whether you are a private investor or a business owner. We have detailed experience of all aspects of wealth management, from investment portfolio management to estate planning. Whether you are looking to protect your wealth, enjoy its benefits now, or pass it on in the future, we are able to advise on the most tax efficient vehicles to enable you to maximise your position. We also work with a small portfolio of trusted Independent Financial Advisors who are able to advise on specific products that meet your needs.

Inheritance Tax Planning

The regulations around inheritance tax are complex but with sound advice and prudent planning, you can minimise your taxation bill and protect your assets for the future.

Trusts

We have considerable experience in all aspects of setting up and administering trusts and can act as trustee or nominee on behalf of a trust. Our range of trust administration services includes bookkeeping, preparation of accounts, filing of tax returns, creation of tax certificates for beneficiaries as well as advice on all aspects of capital gains taxes.

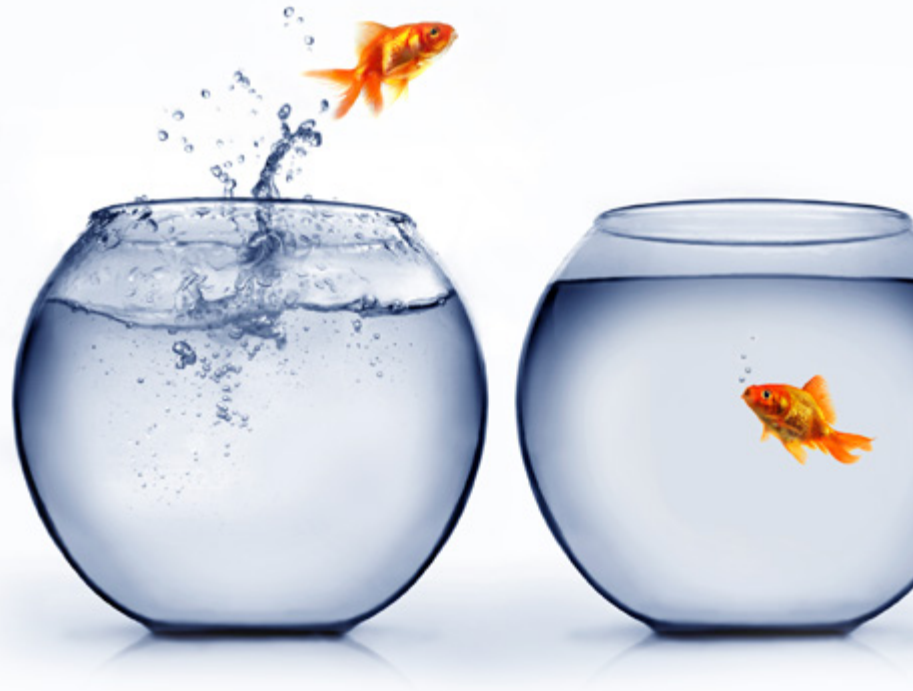
Personal Taxation

With a constantly evolving tax system in the United Kingdom, effectively managing your tax affairs is an increasingly challenging but essential part of sound personal financial planning.

We deal with all aspects of personal taxation, including:

- Income tax
- Capital gains tax
- Inheritance tax
- Tax investigations
- Ex pat tax advisory services
- Tax efficient charitable giving

Changing accountants needn't be a leap of faith



A simple and straightforward process that we manage on your behalf

Clients are often pleasantly surprised at the simplicity of the transition process.

Firstly, upon engagement, we will contact your current accountant outlining your decision to move your financial and taxation affairs to Evans Entwistle. We will also provide a template letter for you to sign to confirm.

Secondly, we will arrange for any of your books or records which your previous accountant holds to be transferred to us, along with copies of your recent accounts and tax computations.

Thirdly, we will advise HMRC and any other official bodies that we are now advising on your affairs and will register ourselves as your tax agent for all applicable taxes so that we can deal with any matters arising on your behalf. We can also offer our address as your company Registered Office and can act as Company Secretary for Limited Companies should you so wish, reducing your administrative burden even further.

In essence...you simply continue running your day to day operations, leaving us to ensure that your statutory obligations are fulfilled, your tax liability is minimised, and your profitability is maximised.

Partners



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Visit the website!
evansentwistle.co.uk

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