Grant Thornton

Business Advisory

Our services to the finance industry



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Our services

Our Business Advisory Services

We work with a broad range of clients and their financial stakeholders, from entrepreneurs in the early days to fast growing and established businesses to public companies competing in global markets. Our hands-on approach means that we take the time to get to know your business and understand your limitations as well as your aspirations. We pride ourselves on gaining insight into the industry and the marketplace in which your business operates.

By doing this, we can provide you with bespoke options whether you are looking for accountancy services, financial outsourcing options or advice on transaction support.

Outsourcing Finance Function

- Bookkeeping
- Financial statement preparation
- Secondments
- Board attendance and reporting where required
- Personalised dashboard and KPIs

Transaction Support

- Due Diligence
- MBO/MBIs
- Exit Planning
- Post Acquisition Integration

Strategic Planning

- 6-Box Model
- Business/Process Improvement
- Cashflow Forecasting
- Competitor analysis

Cyber Systems Support and Migrations

- Training
- Cloud Accounting Solutions
- Cyber Security and Risks
- Financial Modelling

Listings

- TISE Support
- Reporting Accountant
- UK Listing Support
- Financial Modelling

Regulatory support

- International reporting requirements
- AML support/compliance
- Remediation projects
- Local regulatory enquiries
- General regulatory compliance



How we can help

- Take control of complex situations and work through business dilemmas
- Handle key events - acquisitions, succession planning integrations, separations and turnaround
- Identify ways to improve performance within and across business functions
- Create and execute business transformation programmes
- Identify ways to help businesses survive when faced with difficult situations.

To achieve superior results we:

- Listen to client needs - and with you create a robust and appropriate solution
- Develop solutions that are coherent and integrated - to avoid unexpected consequences
- Assemble the right advisory and industry expertise - across service lines or borders as needed - to provide maximum insight and results
- Help you execute with direct support but also by mobilising your own resources.

Our Guernsey based senior Business Advisory team



Brady Lesbirel
Business Advisory Director
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Brady is a Director in the Grant Thornton Channel Islands Business Advisory team. Based in Guernsey, his career spans both Audit and Business Advisory services with over 18 years' experience in providing services to a wide range of clients within the financial services sector, as well as local private businesses.

Brady has extensive experience across financial services, professional services and a wide range of local commercial sectors. His expertise includes working with fund structures, investment managers, corporate service providers and owner-managed businesses, as well as organisations operating in the waste and disposal, research and development, healthcare and retail sectors.



Leanne Bisson
Business Advisory
Senior Manager
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Leanne has worked at Grant Thornton for over 25 years. Starting her career in the audit department she moved to be part of the Business Advisory team over 20 years ago.

Leanne has a range of experience in both the financial and non-financial markets. Her portfolio includes small locally owned businesses, regulated financial service entities as well as some large complex groups.



Fiona Ashworth
Business Advisory Payroll Assistant Manager
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Fiona has over 20 years' experience within payroll and accountancy, with payroll's covering Guernsey, Jersey, Cayman and UK. She has experience working as a payroll coordinator for large international payroll clients, through to working with individuals.

Her accounting background enhances system integration, reporting, and financial accuracy allowing Grant Thornton to deliver more efficient, tailored payroll solutions to its clients.

Our Jersey based senior Business Advisory team



Adam Budworth
Managing Partner
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Adam Budworth is the Managing Partner of Grant Thornton Channel Islands, with responsibility for the firm's strategy, growth, and overall performance across Jersey and Guernsey. A Fellow of the Institute of Chartered Accountants in England and Wales, Adam brings extensive experience advising owner-managed and privately held businesses.

Adam joined Grant Thornton in 2014 to lead the Business Advisory team, was admitted to the partnership in 2015, and was appointed Managing Partner in 2016. Under this leadership, the firm has strengthened its market position and delivered sustained growth, with a continued focus on people, culture, and client service.



Donna Wagstaff
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Senior Manager
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Donna is a Senior Manager in the Business Advisory team in Jersey. Donna has extensive experience in budgets, forecasts, cashflows, accountancy, bookkeeping, management accounting and company secretarial services. She works collaboratively with clients in reviewing and advising on existing business systems and processes and, where appropriate, integrating and customising new systems to ensure the smooth running of their accounting operations. Donna's extensive portfolio includes locally owned clients and many other business sectors.

Donna is a Fellow of the Chartered Association of Accountants, member of the Association of Accounting Technicians and a member of the Association of Taxation Technicians. She is also the Treasurer of the Jersey Chamber of Commerce.



Kimberley Godinho
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Kimberley has gained over 15 years of experience in our accounting and tax departments and has extensive knowledge of the Jersey tax implications for local investment and trading companies.

She advises on the establishment and administration of complex structures to create comprehensive financial planning for personal and business assets.

Kimberley also advises local businesses on the most efficient way of structuring their business and the most tax efficient forms of remuneration for the stakeholders involved.

Case study 1

Banking on success

A large global banking organisation was involved with the launch of a new fund. They had lost a number of staff to other parts of the group and to maternity and long term sick leave.

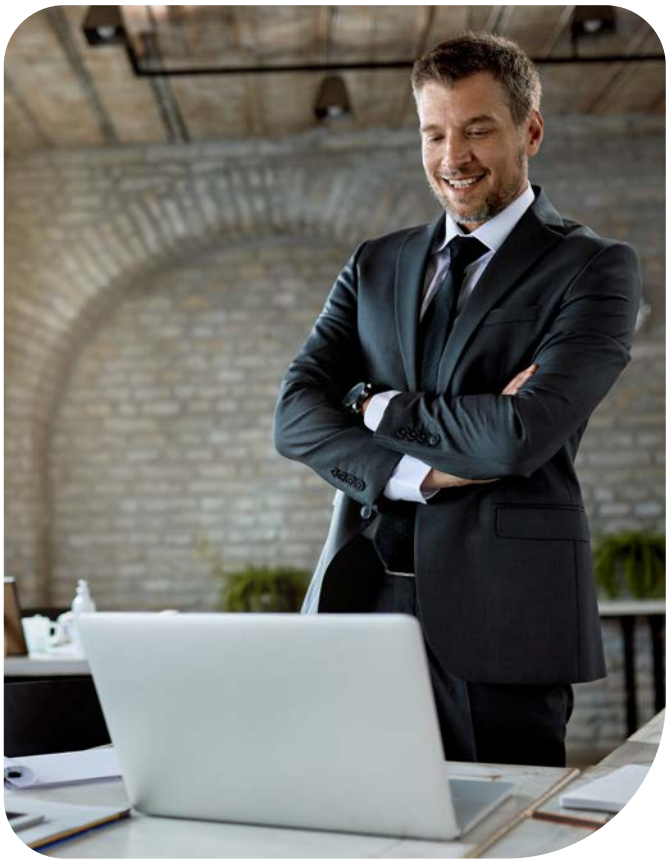


As a result they were unable to man adequately the team needed to assist with the fund launch and ongoing administration. The skill sets required were also quite narrow and specialist. The bank asked Grant Thornton to provide a team of specialists based in Jersey and Guernsey complete with Manager on a secondment basis to carry out:

- Reconciliation of a large number of loan portfolios
- Bookkeeping on internal accounting software
- Preparation of monthly management accounts
- Preparation of IFRS, US and Luxembourg financial statements
- Review of IFRS, US and Luxembourg financial statements to ensure compliance with the relevant jurisdiction

There was a realisation that outsourcing this activity saved them additional costs of recruitment, training and they were able to carry on with the fund launch without any disruption.

During the engagement the Grant Thornton team added further value by recommending process changes and improvements to systems.



Case study 2

Marriage made in heaven

Two local competing fiduciary companies had enjoyed over 30 years of continued success, they were well known in their markets and they often had collaborated in providing services to a number of clients.

One of the fiduciary companies contacted Grant Thornton to help them pursue their ambitions. The fiduciary firm in question was looking for succession solutions. Grant Thornton identified a number of ideas to help them with this issue.

One of the ideas was to find another firm who would have the ability, and want, to grow and acquire.

Grant Thornton found a buyer for the firm and aided with the negotiation process to help the deal complete.

We were also involved in helping provide the relevant due diligence requirements to the Buyer and were able to exceed the expectations of the Seller with the final price agreed.

The Business Advisory team were then able to work with the new larger, combined firm to execute a post implementation plan to help with processes, people and system issues.



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