

# Business Advisory

Our services to the finance industry





# 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
- Valuations



### 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



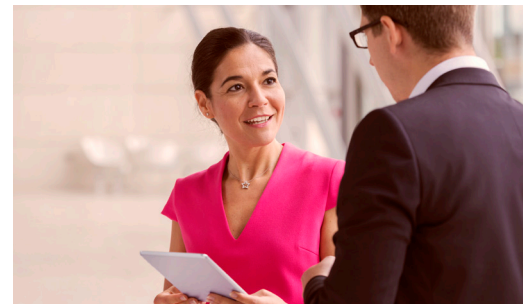
### Listings

- 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.



# 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.



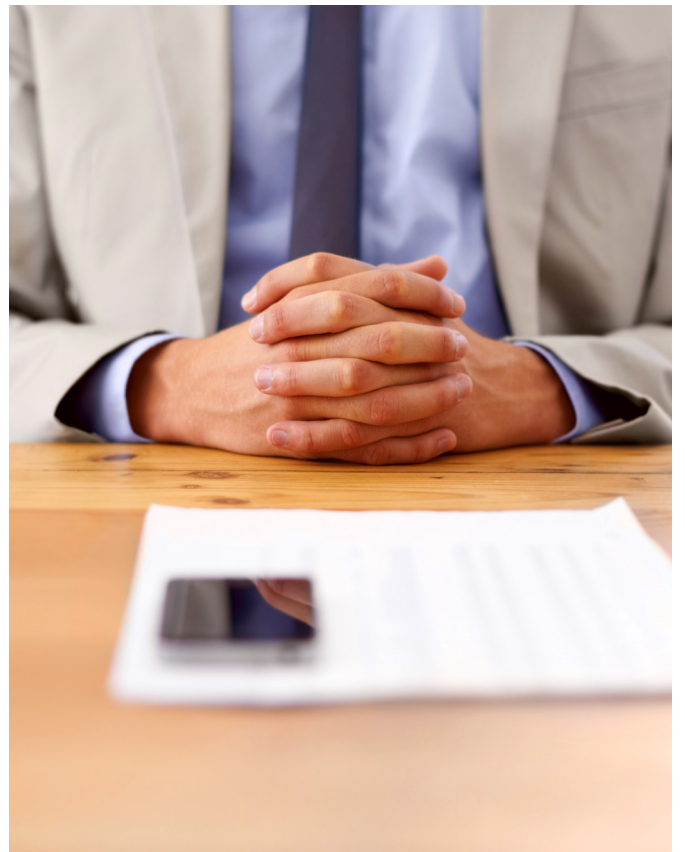
As a result they were unable to manage adequately the team needed to assist with the fund launch and ongoing administration. The skill sets required were also quite narrow and specialist. The bank asked Grant Thornton to provide a team of specialists based in Jersey and Guernsey complete with Manager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





# Our team



## Kirsty Wheadon

Director | Business Advisory

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### Experience

Kirsty is a director and heads the Business Advisory department in Guernsey.

Kirsty and her team offer a range of services that includes audit, accounts production, fully outsourced finance functions, business plans and cash flow projections, forensic work, transaction support and valuations.

Kirsty is also a mentor and coach, in which she works with CEO's and senior leadership teams to help them overcome challenges, stretch themselves, develop new skills and grow their businesses.



## Adam Budworth

Managing Director and Business Advisory Director

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### Experience

Adam is the firm's Managing Director and is a Fellow of the Institute of Chartered Accountants of England and Wales.

He manages a broad portfolio of clients and has a wealth of experience covering all areas from dealing with owner managed businesses, from provision of statutory records, book-keeping, accountancy support, business plans and cash flow projections and forecasts for acquisitions and third party borrowing.



# Our team

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## Donna Wagstaff

Senior Manager | Business Advisory

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### Experience

Donna is the Manager in the business advisory team and has in excess of 30 years' experience in budgets, forecasts, cashflows, accountancy, bookkeeping, management accounts and company secretarial services.

She is a Fellow of the Association of Chartered Certified Accountants and a member of the Association of Taxation Technicians.

Donna has a varied portfolio of locally owned clients and has experience in many business sectors.

She works closely with clients in respect of multi-entity outsourced assignments and is involved in day to day activities such as banking and making payments, assistance with cash flows, budgets and accounts preparation.



# Grant Thornton

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