

# Business and accounting support for professional services





# Our services

Whatever professional services industry you are in:



Medical



Legal



Real estate



Consulting



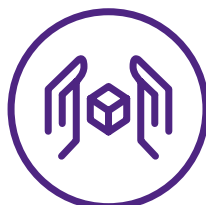
Architectural



Marketing



Trusts and fiduciaries



Captive insurance



Fund administrators

**As with most businesses, you may spend more time working in, rather than on your business.**

- We can help you focus on your core business goals without utilising resources on the smaller tasks or projects which fall by the wayside.
- We can provide the support required and can be a strong, trusted business partner for the future
- We want to help you work towards achieving your goals.



# What we can offer you

Our experienced professional services team can relieve you of the pressure allowing you to get on with the important job of dealing with clients and growing your businesses.

At Grant Thornton we have been supporting the professional services sector in the Channel Islands for over 40 years. As a member firm of Grant Thornton International we also have access to the expertise of other member firms in over 143 countries.

We understand how to successfully manage your firm, at whatever stage of the business lifecycle it is:

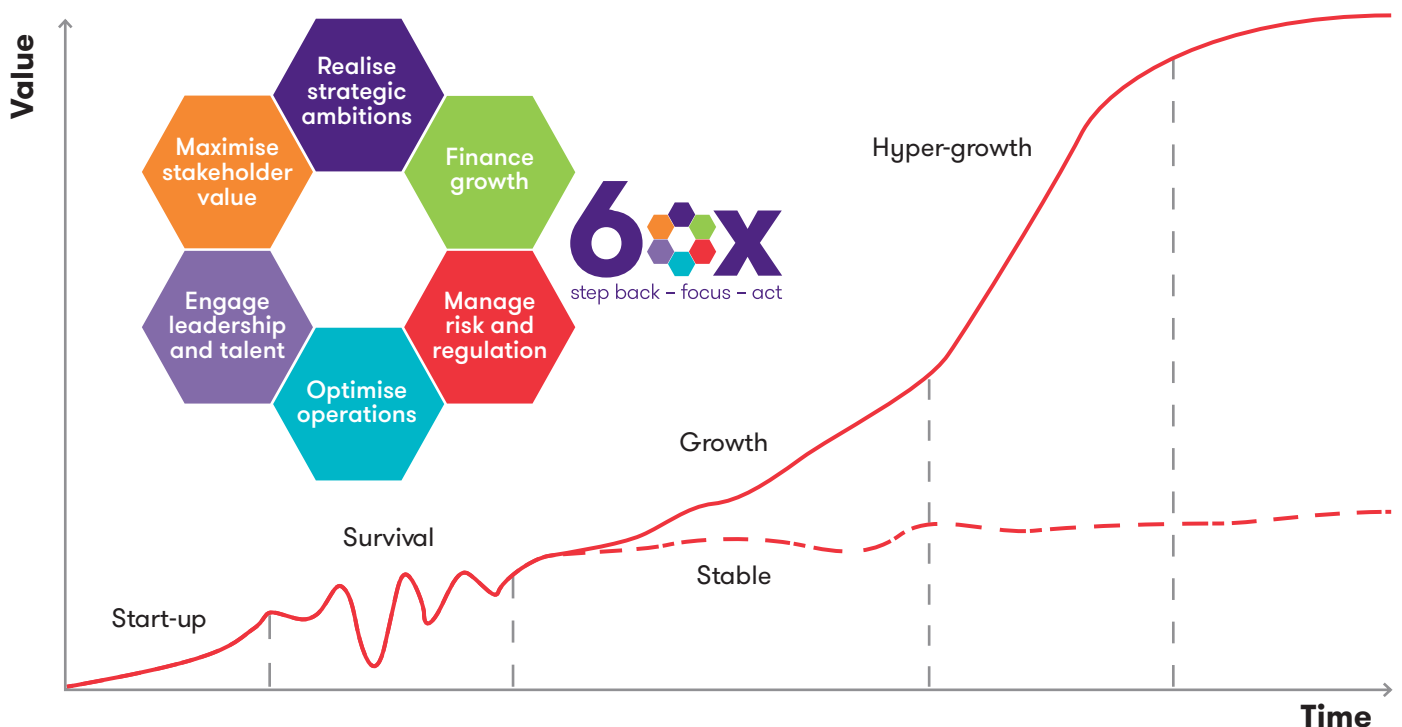
- Start Up
- Survival
- Growth
- Maturity

and we can tailor our services to your specific needs.

## Helping businesses grow

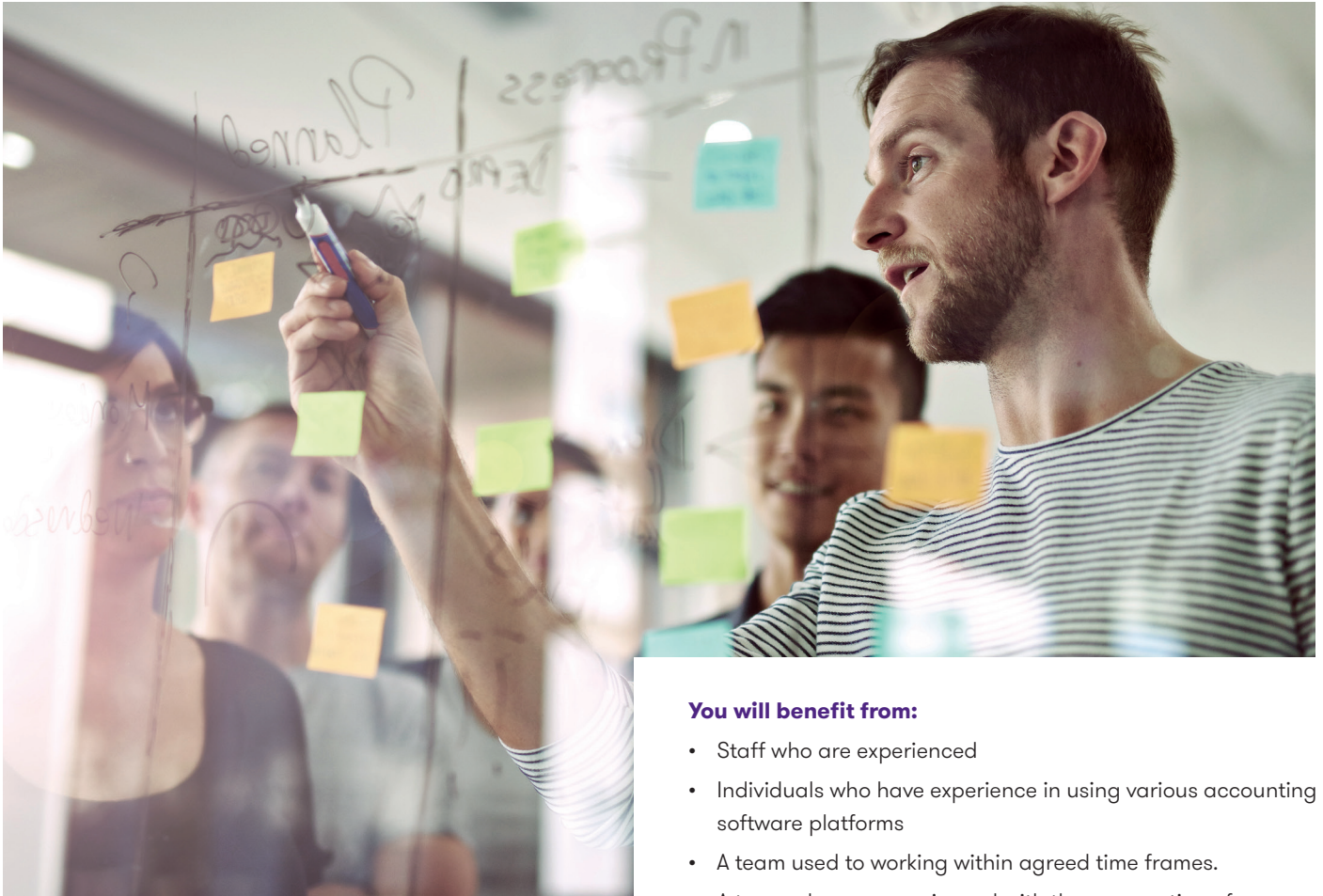
The 6-Box framework enables wider and more meaningful conversations, through understanding the strategic opportunities and challenges organisations face.

The 6-Box approach, can be used to create a detailed action plan to help develop businesses, by focusing and directing growth from six key areas.





# Accounting services offered



## **The Business Advisory team carry out a multitude of assignments and projects, some of which include:**

- Annual accounts preparation
- Payroll services
- Monthly/quarterly management accounts preparation
- Monthly bookkeeping on various accounting software
- Billing and collection
- Outsourcing services to a range of businesses for the provision of bookkeeping and accounting
- Provision and support of senior members of the team to report to the Board on all financial matters
- Outsourcing of client accounting functions.

## **You will benefit from:**

- Staff who are experienced
- Individuals who have experience in using various accounting software platforms
- A team used to working within agreed time frames.
- A team who are experienced with the preparation of accounts under UK GAAP and IFRS and other accounting frameworks
- Access to our technical skills
- A team you can trust
- A bespoke service
- Agreed pricing and billing method
- A team flexible to your needs.

## **Taxation Services**

We can provide access to our tax department who has vast experience in local and international taxation matters who currently assist with a number of professional services businesses. They regularly deal with complex tax structuring matters along with providing training and support on FATCA, CRS and substance reporting requirements.





# Our services are more than just accounting



## People

As a professional services practice, it is often said that you are only as good as your people. Your people are your product and your service. It is important that at all levels your people help create a positive culture, they are well motivated, understand their roles, take their time to understand the needs of their clients and make sure that these needs are met at every client touch point. We can help assist you to create a positive culture, promote wellbeing and provide you with the tools to ensure a positive client experience every time

### We can help you specifically with:

- Investors in People Wellbeing audits and accreditation
- Staff Training and development programmes
- Client service delivery questionnaire programmes
- Counselling, coaching and development initiatives



## Processes

### An effective professional services practice will need effective and efficient processes.

These are not just limited to the financial workflows.

Process improvement is a key feature of many Grant Thornton Software applications. These applications serve to automate processes that are added into the software suite.

Once the processes are run via the software, our managers and directors can then see where improvements are needed within the process by looking at process completion times involved.



## Systems

Professional practices rely on systems to deliver effortless and seamless business support.

The use of technology is a crucial component in delivering a high-quality service. We have expertise in the Channel Islands on data integrity, information security and technological improvements.

With the quantity of information available to us, utilising the right information is key. Business Intelligence systems help draw out the important analysis of data to aid decision making.



# 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 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

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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 also works extensively in Audit.

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



**David Carney**  
Director | Risk Assurance  
and Data Analytics

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## Experience

David heads the Risk Assurance and Data Analytics offering for our firm across the Channel Islands.

David is a Chartered Accountant and a Certified Information Systems Auditor (CISA), who has recently re-joined the firm having originally qualified with Grant Thornton UK. David brings over 20 years' experience in helping clients from a variety of sectors including public, retail, manufacturing and financial services to better leverage digital technologies.

His experience includes, Service Attestation Reporting, Internal Audit, IT controls, Data Protection, Information Security, Technology & Data Assurance, Data Analytics & Computer Assisted Audit Techniques ("CAATs") and Technology Consulting.



# Our team



**Susie Crowder**  
Director | Human Capital Advisory

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## Experience

Susie is a Director and heads the Human Capital Advisory team, joining Grant Thornton in 2020. Susie and colleagues offer a range of culture, business strategy, human capital, board advisory and evaluation services to a range of stakeholders across the islands.

Susie has a wealth of board level Human capital experience having worked for a range of blue chip companies and she also holds a number of Non-Executive Directorships and is the founding Director of the charity Bright Futures LBG.



**Martin De La Mare**  
Senior Manager | Business Advisory

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## Experience

Martin is the Senior Manager for the Business Advisory team in Guernsey and has in excess of 20 years' experience within the financial services industry. He held a senior management position and sat on several boards within the fund administration and investment management industry gaining experience of a client base encompassing a wide range of alternative asset classes.

He is a Fellow of the Association of Chartered Certified Accountants and achieved a first class honours degree in applied accounting.



**Donna Wagstaff**  
Senior Manager | Business Advisory

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## Experience

Donna is the Manager for 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.



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