



Chartered Accountants
Business & Tax Advisers

Experience the difference

about hwb

What is it that sets us apart?

We're business people first and foremost. That makes us passionate about our business... and most importantly passionate about yours!



Passionate about our business... and yours

As one of the leading practices in the region, we offer the benefits of extensive, specialist teams with depth and breadth of resource and experience.

We support clients across the board, from entrepreneurial start-ups to corporates and every shape and size in-between.

We're business advisers, a strategic touchpoint and a proactive business resource. We're commercial, fast-paced and intuitive.

Our aim?

To understand your business, your goals, aspirations and strategy.

Working together

We like to work closely with you and know it's important to have easy access to advice and support.

Two key people make that happen. Firstly a dedicated HWB director takes responsibility for your account. As a second contact point, each client has a dedicated, qualified business adviser.

Working together we are best placed to deliver most effectively – to develop clear strategy, improve profitability, grow the business, secure finance, reduce tax liabilities or work towards a sale or retirement.

At our core

Professional, clear, straight talking advice with commercial edge at its core.

 **hwb**
Chartered Accountants
Business & Tax Advisers

 For an initial consultation, at no cost, please telephone 023 8046 1200.

audit and accountancy services

With audit and accountancy services, compliance and technical ability comes as standard.

It's taking the service to the next level that makes the difference.

Statutory accounts

Annual accounts may be a statutory requirement, but when those figures are interpreted and put into context by your adviser, they take on a whole new meaning.

Objective, pragmatic and informed advice delivered in a straightforward way helps to challenge assumptions, deliver solutions and identify and minimise risk.

Strategic direction, tax efficiency and cost savings – the annual accounts exercise can save more than it costs.

Management accounts

Regularly produced, quality management accounts with key performance indicators and risk alerts help maximise profitability and minimise risk.

Audit

Our audit team has a depth and breadth of resource capable of meeting exacting deadlines.

Our team provides specialist experience in the audit of academy schools, service charge accounts, pension funds and charities.



 For an initial consultation, at no cost, please telephone 023 8046 1200.

company secretarial services

Of course our company secretarial services ensure statutory compliance.

But knowing you can rely on us to keep you on track while you get on with running your business gives peace of mind... and that makes the difference.



Rely on us

Compliance with the Companies Act is time-consuming and increasingly complex – and failure can lead to significant penalties and even prosecution.

Our proactive services deliver peace of mind on regulatory compliance and ensure all those important deadlines are met.

That means you can concentrate on the things that matter – the success, profitability and growth of your business.

Some or all

We can undertake any, or all of your company secretarial services:

- ❑ complete and file annual returns
- ❑ ensure key dates are identified, reminders issued and deadlines met
- ❑ register the appointment or resignation of directors
- ❑ hold and maintain statutory records
- ❑ prepare AGM and board minutes for approving accounts
- ❑ document dividends and provide dividend vouchers
- ❑ provide advice for statutory matters
- ❑ form companies
- ❑ recommend company structures
- ❑ register the issue of new shares and document share transfers
- ❑ registered office facility



Chartered Accountants
Business & Tax Advisers

 For an initial consultation, at no cost, please telephone 023 8046 1200.

specialist tax advice

“Nothing can be said to be certain except for death and taxes,” said Benjamin Franklin.

Neither can be avoided... but at least tax can be minimised!



Company tax efficiency planning

The UK tax regime is constantly evolving. Keeping pace demands specialist skills and a constant eye on tax efficiency.

That involves planning for:

- ❑ Corporation tax
- ❑ Income tax
- ❑ Remuneration planning
- ❑ EMI Schemes
- ❑ EIS Schemes
- ❑ PAYE
- ❑ NIC and VAT

Personal tax, finances and pension planning

For many business people, personal and business affairs are inextricably linked and that connected tax picture needs to be viewed holistically.

In partnership

Our specialist advisers work with you to support financial planning and tax minimisation for:

- ❑ Trusts
- ❑ Landed estates
- ❑ Retirement
- ❑ Capital Gains Tax planning
- ❑ Inheritance Tax

We have formed an alliance with a firm of Independent Financial Advisers who are authorised and regulated by the Financial Conduct Authority. We work closely with them on personal financial and pension planning matters.

VAT

We have specialist in-house VAT expertise to help you with any VAT questions or prepare in advance for an HMRC visit.

 **hwb**
Chartered Accountants
Business & Tax Advisers

 For an initial consultation, at no cost, please telephone 023 8046 1200.

outsourced payroll

With staff as a huge business asset, it's critical that your payroll process is smooth, efficient, flexible, responsive and fail-safe.

If yours isn't... then let us make the difference.



Critical function

Payroll is a critical function. It's also one which can be a headache as an in-house operation – often expensive and problematic at times of absence of your payroll personnel.

For businesses of all sizes, outsourcing to our specialist, friendly, payroll team delivers an efficient, safe and cost-effective option.

The benefits to your business

- ❑ no need for in-house payroll team
- ❑ cost savings of in-house system maintenance
- ❑ reduced administration and paperwork
- ❑ no absence management issues
- ❑ instant technical access to specialist payroll professionals
- ❑ help dealing with HMRC enquires
- ❑ auto-enrolment advice

What do we deliver?

- ❑ payroll – accurate and on time
- ❑ statutory payments calculation
- ❑ pension scheme deductions and administration
- ❑ post-payroll reporting
- ❑ payroll professionals helpline
- ❑ monthly PAYE/NIC liability notification
- ❑ BACS payment preparation
- ❑ real-time information (RTI) compliant submissions
- ❑ flexible service to fit with your business
- ❑ completely confidential service



Chartered Accountants
Business & Tax Advisers

- ☎ For an initial consultation, at no cost, please telephone 023 8046 1200.

buying or selling a business

As business people ourselves we understand that, when advising on the sale or purchase of a business, it is important to get exactly the right deal.

We tailor our services with this in mind, with you at the heart of the process.



Delivering results

Whether you are looking at growing your business by acquisition or preparing your business for sale, we are focused on delivering your short, medium and long-term strategic goals.

With strong relationships with banks, venture capitalists, private equity investors and solicitors, our transaction sizes typically range from £1m to £25m with specialism in the mid-corporate sector.

Lead advisory and transaction support services

- ❑ acquisitions and disposals
- ❑ advising on management buy-outs/buy-ins
- ❑ business and company valuations
- ❑ facilitating an increase in the value of your business
- ❑ tax planning and advice
- ❑ advice on heads of terms and sale agreements
- ❑ lending reviews
- ❑ financial due diligence assignments
- ❑ business plans and forecasts
- ❑ identifying potential purchasers
- ❑ screening targets for suitability
- ❑ negotiating with vendors or purchasers



Chartered Accountants
Business & Tax Advisers

 For an initial consultation, at no cost, please telephone 023 8046 1200.

business strategy and planning services

In business, there are times when we need to draw breath and review goals, develop strategy and plan for the future.

Informed, objective advice from our team of strategic specialists can help you plan to achieve your objectives.



Straight talking, informed advice

In the life cycle of a business, there are key times when intelligent, objective, straight talking advice delivers the best value.

Whether you're looking to improve profitability, streamline efficiency, increase productivity, deliver significant growth, reduce costs, embark on an acquisition trail or work towards an exit... our team of business strategists can help.

With our commercial acumen and accountancy skills our trained facilitators work with you, challenging assumptions, thinking objectively, supporting decisions and becoming an informed business ally as you develop your business strategy and plan.

Waste reduction

With research indicating that most businesses can save as much as 20% on costs with no reduction in performance, our cost efficiency improvement process tackles waste issues head on, making savings on costs and delivering straight to your bottom line.

Valuing a business

Our simple, bespoke evaluation process takes you on a clear path to improvements in the run up to a sale. The result? A realistic action plan, deadlines and responsibilities to make the improvements.

Exiting your business

When the time comes your adviser will know you and your business and be best placed to work with you on what may be one of the most important decisions of your working life.


Chartered Accountants
Business & Tax Advisers

 For an initial consultation, at no cost, please telephone 023 8046 1200.

hwbit

In an increasingly competitive business environment and with the ever-changing technological landscape, efficient IT systems and quality of financial data are key to every business.

How we make a difference

High quality, independent and impartial advice ensures your systems run smoothly, and are more streamlined, less time-consuming, more flexible and cost-efficient.

With an HWBIT managed service you will have access to:

- ❑ a virtual IT Manager – so no need for in-house expertise
- ❑ consultancy advice – straight talking, independent and objective
- ❑ a range of support services – flexible to meet your needs and budget
- ❑ a hosted dashboard – allowing you to run your software applications and access your files from any PC or mobile device with an internet connection
- ❑ online accounting and tax solutions
- ❑ back-up and security solutions
- ❑ SMS solutions

Accountancy software support

With specialists in Xero, Sage 50 Accounts and Sage Payroll, we advise on the introduction and operation of a range of accountancy software.

Our team can support you with training, advice and cover to ensure the process for producing regular management accounts is as smooth as possible.

 **hwb**
Chartered Accountants
Business & Tax Advisers

 For an initial consultation, at no cost, please telephone 023 8046 1200.

HMRC Enquiry Fee Protection

If you had an HMRC investigation today
could you cope with the demands?

Could you afford the professional fees?

Our fee protection service can deliver
peace of mind.

Peace of mind

There's never a good time for an HMRC enquiry or investigation.

Responding can be complex, time-consuming, stressful and costly.

Our fee protection service provides peace of mind should you have an enquiry.

We respond to Revenue enquiries, liaise with you and deliver all information.

HMRC requires we keep you advised throughout the enquiry process and our fees, up to £100,000, will be covered.

While we look after the Revenue, you can look after your business... that's the difference.

Support

- ❑ Corporation and Income Tax Enquiries
- ❑ Schedule 36 Interventions & Inspections
- ❑ PAYE/NIC Employer Enquiries
- ❑ VAT Enquiries
- ❑ CIS, IR35 & Other Status Enquiries
- ❑ Business Records Checks
- ❑ Inheritance Tax Enquiries
- ❑ Special Civil Investigations
- ❑ Cover for directors and partners including spouses and civil partners

Telephone helpline

- ❑ Access to health and safety, employment law and business law telephone helplines


Chartered Accountants
Business & Tax Advisers

 For an initial consultation, at no cost, please telephone 023 8046 1200.

charities

Managing charity finances requires a pragmatic approach with a clear understanding of compliance.

Expert, practical and well-rounded, our services help charities to thrive...and that makes the difference.



Sector specialists

We specialise in supporting the finance team through the accounting, VAT, tax, and audit requirements that come with charitable status.

With a proud pedigree as auditors and advisers to this sector, we advise on a full range of services to ensure each charity is fully compliant with the law and can make the most of its restrictive resources to obtain value for money.

Our dedicated team of charity specialists are on hand with expert advice and guidance so we can meet the needs of each organisation.

Our clients range from new start-up charities to centuries-old, from clubs and membership organisations to social enterprises, from independent schools and academies to service delivery charities, from grant-givers and endowed foundations to theatres and cultural organisations.

Tailored solutions

Our services cover:

- ❑ annual accounts preparation (in accordance with the Charities Statement of Recommended Practice (SORP) and the Charities and Companies Acts
- ❑ annual audit
- ❑ independent examinations
- ❑ specialist grant return certification audits
- ❑ internal audit
- ❑ specialist VAT advice
- ❑ advice in respect of trading subsidiaries and tax
- ❑ accounting software advice and support
- ❑ management accounts and payroll
- ❑ PAYE/NIC and VAT health checks
- ❑ due diligence
- ❑ advice on gift aid
- ❑ advice on forming a charity and the structure that best fits your organisation
- ❑ governance process reviews
- ❑ training for trustees and boards

 **hwb**
Chartered Accountants
Business & Tax Advisers

 For an initial consultation, at no cost, please telephone 023 8046 1200.

probate and estate administration

We know wealth protection and peace of mind are paramount for estate administration.

Bespoke, cost-effective and professional, our service with a personal approach streamlines a complex process.



Working with you

Traditionally, probate and estate administration has been a complicated, expensive and potentially stressful process requiring a solicitor.

As one of the first accountancy practices in the region to obtain a licence from the Institute of Chartered Accountants in England and Wales to undertake probate work, we are able to see through all aspects of estate administration for our clients.

Our service is flexible so you can choose for us to assist with as much or as little as you need.

Our team of specialists are able to offer a 1-hour FREE consultation to discuss all aspects of probate and how we can help.

Complete service

We can provide assistance to our clients and their families with any of the following areas:

- ❑ working with you or your representatives to assist with legal responsibilities
- ❑ handling taxation issues up to the date of death
- ❑ collecting details of the deceased's assets and liabilities and obtaining professional valuations where required
- ❑ completing inheritance tax (IHT) accounts and forms
- ❑ claiming any IHT reliefs or exemptions and calculating the IHT payable
- ❑ applying for and obtaining the grant of probate or guiding you through the process
- ❑ dealing with capital gains and income tax liabilities of the estate
- ❑ preparing tax returns through the administration period
- ❑ compiling or selling the assets of the estate
- ❑ settling any debts of the deceased and arranging IHT payments
- ❑ identifying any potential tax savings through a variation of the Will within two years
- ❑ distributing assets to beneficiaries and paying legacies
- ❑ preparing the final estate accounts


Chartered Accountants
Business & Tax Advisers

 For an initial consultation, at no cost, please telephone 023 8046 1200.



Chartered Accountants
Business & Tax Advisers

T 023 8046 1200 F 023 8026 9621 E admin@hwb-accountants.com W www.hwb-accountants.com

Highland House, Mayflower Close, Chandlers Ford, Eastleigh, Hampshire, SO53 4AR