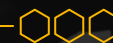


WE ARE

**FORTUS**

BUSINESS ADVISORS & ACCOUNTANTS

WHERE KNOWLEDGE, STRENGTH & COURAGE DELIVER ON AMBITION



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# ARE YOU LOOKING FOR WAYS TO HELP YOUR CLIENTS ACHIEVE MORE IN THEIR BUSINESS?

We recognise you're great at what you do, and have an excellent and trusted relationship with your clients. You do a lot for them, and have ambition to do more.

There are some specialist areas which, simply because of your size, you're currently unable to offer. The good news is, working with the team at Fortus, we can help you to offer more.

Let's explain what we can do and how we can support you...





# STRATEGIC REFERRAL PARTNERSHIP...

As the industry landscape has changed and evolved, we've continued to grow our strategic referral partnerships. Our collective strength is a significant force in the industry, giving you the peace of mind that the complex needs of your clients are met by an experienced team of service line specialists.

Over the years, we've refined our services in response to our own client needs and the ever changing regulatory environment. We've cultivated a unique recipe for success, which offers you the necessary support, access to specialist services, and protection from highly regulated activities that will help you grow your business.

Our distinctive approach is based on long term and productive partnerships, underpinned by the key principles of integrity, transparency and quality of service in everything we do. Our commitment to you, is to never compete on services.

We can offer you an outstanding partnership package; giving you a range of unparalleled services to make you more profitable, lower your exposure to risk and receive additional support to give your clients the specialist advice they need.

The breadth of our services provides you with an opportunity to work more efficiently with just one strategic partner, without the need to develop and maintain relationships through a variety of different suppliers.



# REGULATION & RISK...

We operate in a highly regulated environment and our standards – as well as our ethics - are governed by the ICAEW and the CIOT.

We understand clients value specialists, and that specialist teams are expensive to establish and integrate into your business.

We also understand regulated business poses an additional risk to your business if it isn't completed by someone who undertakes the regulated and complex work on a regular basis, but working with an outsourced team of specialists who undertake this sort of work on a daily basis, can significantly reduce that risk.

As a business with its roots in accounting and tax, we understand the relationships you have with your clients, and we respect them. We aim to enhance the relationship you have with your client, not damage them – and this comes with a responsibility to practice what we preach, and our key principles of integrity, transparency and quality of service are the foundations of our strategic referral partnerships.

We respect you, and we respect your clients - and we're here to support and keep you both regulation compliant.



# ONE TEAM, YOUR TEAM

We believe if our people succeed, our partners do too. Collaboration's more than a buzzword to us – it's the foundation of how we work. When you work with us, it's a genuine team effort, no matter which service line's involved. Let our team become your team, to bring specialist advice to your clients.







# OUR SERVICES

# INNOVATION TAX RELIEFS

Making a successful claim for R&D tax relief could make a huge difference to your client's business. HMRC estimates that 97% of eligible companies are missing out on R&D tax credits. Many don't realise they're even eligible, what they can claim for, or how to make a successful claim.

Our Innovation tax team know this area inside and out. They house a wealth of experience gained both in practice and in senior positions within HMRC, providing a great combination of tax and industry based knowledge. They're the ideal team to be advising you and your client.

“

*Working with the Innovation team at Fortus has been a pleasure. From identifying the opportunity in the first place, the depth of knowledge within the sector and the tax experience was to be expected from a company of their stature. The successful claims we've made have helped maximise the tax benefit to our business, enabling us to invest in our social value projects and further reinvest in our company's infrastructure and talent, ensuring continued design innovation and construction excellence.*

”

## ANDY MORRIS

Business Development Director  
Ashe Construction

## VIC

ULFIK

HEAD OF INNOVATION  
TAX RELIEFS

07920  
592575

in 







**MARK**

**STANDISH**

**DIRECTOR - HEAD OF  
CORPORATE FINANCE**

07770  
446446

in 

# CORPORATE FINANCE

Our Corporate Finance team can be a great asset to your business, whether you have clients looking to build value in their business, buy or sell a company, raise finance or plan their succession. They deliver impressive results, time and again.

Our specialist team live and breathe this part of financial services, so they can bring their extensive knowledge to you and your client, and aim to avoid submitting funding applications which might not hit the mark for the lenders. Their extensive network of contacts could open doors to alternative sources of finance, which may be a better match for your client.

“

*Having the Fortus Corporate Finance team on board during the acquisition gave me confidence to make courageous decisions. They identified a company that was looking to pull out of the UK, and we'd been looking to expand into manufacturing - it was the right acquisition at the right time. Importantly, they also helped us secure the right deal.*

”

**JASON KING**

Managing Director  
JRM Group

# RECOVERY & INSOLVENCY

It can be very unnerving if a client falls into liquidation, the rules surrounding business insolvency are complex. So, if you have little or no previous experience, you could feel unsure about the options available. We believe that as soon as a business shows warning signs of financial problems, early intervention CAN help a business to recover and get back on track.

For this to happen, it's essential to have a strong relationship with a reputable insolvency practice. After all, it's in your interest to help a client facing insolvency to retain their business. We offer a free initial meeting to you and your client to discuss their situation and take those first steps towards a solution.

“

*The Fortus team were very helpful in assisting me with a client issue. I'm a local accountant, and my client had some queries in relation to a liquidated company and director liabilities. Thank you again for your help and for sharing your knowledge.*

”

AMY R.

## GORDON

JOHNSTON

EXECUTIVE  
DIRECTOR

07775  
627888

in 





**CHRIS**

**WILSON**

**DIRECTOR -  
HEAD OF TAX**

07826  
919791

in 

# TAX ADVISORY/PLANNING

Tax legislation's continually evolving and increasing in complexity, which is why we've invested in developing a range of specialist teams with expertise across areas such as VAT, R&D, Employment Taxes, Personal Tax and IHT, Capital Allowances, Corporate Restructuring, and International Tax.

Our specialist advice is there, ready for you to tap into when more complicated issues arise. Our joined-up approach across these specialist areas means all tax angles are explored for your client, and you're assured they receive the right advice.

“

*The Fortus team have added considerable value both to our clients and our firm. They communicate with great clarity throughout the process from planning to execution.*

”

**BILL HUMPHREYS**

Director  
Libra Wealth Management Limited



# VAT

We have a team of VAT specialists to help business owners, and not for profit charities, reduce the burden of dealing with VAT. We can support your team with our in-depth knowledge and experience. Whether it's helping clients stepping over the VAT threshold and wanting to maximise reliefs, through to those trading internationally with the need to manage more complex VAT compliance and liabilities.

It's also reassuring to know that our specialists deal with VAT disputes on a regular basis, so we can support any of your clients who may be facing a dispute from HMRC in regard to their VAT position. We're ready to use our experience to fight your client's corner.

“

*Fortus have been especially helpful around advising on all aspects of VAT from the day to day queries that we have right through to detailed advice and training around proposed HMRC changes in our sector. The team are always on hand to assist whatever the nature of our query and the advice is always delivered promptly which is extremely valuable in this fast moving environment.*

”

## THOMAS HOLLAND

Managing Director  
Holland Build

## DAVID

McGEACHY

HEAD OF VAT

07917  
108794

in 







**TOM**

**DYMOND**

**DIRECTOR -  
HEAD OF PROPERTY**

07810  
756399

in 

# PROPERTY SERVICES

Although you may not expect a Business Advisory and Accountancy firm to have a Property Services team within it, we see this as a huge asset for clients. Our property team, led by experienced Chartered Surveyors, provide a full suite of property services and also work closely with our tax teams on specialist areas such as embedded Capital Allowances and Land Remediation Relief – thus providing property and tax expertise under one roof.

Our team represent both property owners and occupiers, and will ensure your client maximises the returns from their property assets or manages their occupational costs effectively and efficiently.

“

*Through consultation, the Fortus property team helped us agree on a refined search criteria. This covered key requirements of the new site and identified office features that would best support our organisational culture, before negotiating an excellent deal on a new lease. They've saved us an immense amount of time and we've now instructed the team to manage the exit from our old lease to minimise our liabilities.*

”

**STEVE HYDE**

CEO  
Push Group

# AUDIT & ASSURANCE

An audit can be a powerful tool for any business. It's a simple and effective way to demonstrate credibility. It can also add a huge amount of value, by way of reassurance for key stakeholders, both today and in the future.

You understand your client's ambitions best, and will know whether an audit will support them in their journey. Our approach is collaborative, painless and non-disruptive to any business we work with.

“

*Fortus always works collaboratively and tirelessly with us to deliver quality and robust audits, despite the complexity of our structure and challenging stakeholder demands.*

”

**GEORGE IDICULA**

CFO  
Kindred Education

**EMMA**

**JONES**

**HEAD OF AUDIT**

07826  
919791

in 







**STEPHEN**

**WATTS**

**DIRECTOR**

07789  
961839

in 

# INTERNATIONAL SERVICES

When it comes to our international connections, we're proud to be part of the Morison KSi 'global family' of member firms. Morison KSi's the 10th largest global association of leading professional service firms, which will ensure you and your client receive top quality advice across the globe.

Whether it's support with financial management, tax and legislation, finding the right people or property, you can trust our specialist team to help you smooth out those complexities.

“

*Having access to local expertise in Germany via Fortus, meant we could find out everything we needed to know about trading there.*

”

**GAVIN MORTIMER**

CEO

PRS Guitars International

# FORTUS IN NUMBERS

**15**  
SERVICE LINES



**3,300+**  
CLIENTS



**260+**  
PEOPLE



**12**  
UK LOCATIONS



**C.£20M**  
TURNOVER



**76**  
GLOBAL LOCATIONS\*



**6**  
SPECIALIST SECTORS





# CONTACT INFORMATION

## GLASGOW

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177 West George Street  
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G2 2LB

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## HUNTINGDON

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Huntingdon  
Cambridgeshire  
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01480 434609

## LEEDS

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Leeds  
West Yorkshire  
LS1 5HN

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## LEICESTER

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Hamilton Office Park  
Leicester  
LE4 9LJ

0116 276 2761

## LONDON

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Soho  
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W1F 7NJ

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Seebeck Place  
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Milton Keynes  
Buckinghamshire  
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## NORTHAMPTON

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Northampton  
NN4 7YB

01604 746760

## PETERBOROUGH

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Hampton  
Peterborough  
Cambridgeshire  
PE7 8GX

01733 557362

## READING

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YO11 1TS

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COURAGE DELIVER ON AMBITION

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