





# It's what we bring together that sets us apart

We are a dynamic accountancy firm, providing a comprehensive range of services across a wide range of sectors.

Whether you are a SME, owner managed business, large company, public sector organisation, charity, school or private individual, we have the capability and capacity to meet your needs. From our office locations in the South West and the West Midlands we are able to serve clients across the UK, and internationally through our membership of Kreston International.

## **We are relationship led**

Our relationship-led focus is about how we work with you, and how our people work with each other. Together, we deliver a common purpose to become your trusted advisers.

## **We are experienced**

You will benefit from the highest standards of professional excellence, underpinned by a dedicated team who take time to understand your needs.

## **We are sustainable**

We'll build a strong long-term relationship with you. Our sustainability is built on growth and with our growth comes the ability to adapt and evolve to your changing needs.

## **Our work is rewarding**

Our relationship focus makes our work more interesting, challenging and enjoyable – and a better client experience for you.

**“Our clients come to us for our experience. But this is more than just technical knowledge. They come to us because of the people we are and the relationship we develop.”**

**Andrew Sandiford**, Managing Partner

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# Our ambition

We have used our centenary year to launch our new ambition, underpinned by a new set of values that reflects our people, our culture and the importance of rewarding relationships.

We bring together diverse talented people with ideas and opinions, an entrepreneurial spirit and a willingness to collaborate across all of our offices.

Our consistent culture and client experience, paired with the right technologies and systems, enable us to deliver more rewarding experiences for our people, clients and communities.

## Our ambition is to be:

The most rewarding accountancy firm in the UK for our clients, our people and our communities

## Our values:



We think client



We put relationships at the heart



We work as one team



We have the courage to be different



We do the right thing

# Our client focus

We know that we only truly succeed when our clients succeed - so putting ourselves in our client's shoes at every opportunity, means we are more likely to deliver the service, advice and solutions that consistently exceed your expectations.

Each of our clients are different, but they can be confident they are receiving the very best, consistent advice from experts who understand their needs.

Our priority is to anticipate your needs and guide you through any changes you need to make.

That's why we proactively invest time with you to better understand your challenges, opportunities and aspirations.

We're proud to have been awarded the Gold Standard in our recent Investor in Customers survey, which demonstrates our commitment to delivering exceptional client service.



"Quality, client-focussed people who are always willing to assist and introduce new colleagues with relevant experience."

"Bishop Fleming offer a first-class service. We have an excellent working relationship and they always listen to our needs."

"I have been a client of Bishop Fleming for almost 30 years - I think that shows how I regard them."

## What sets us apart

"They have a full range of services to offer and deliver a personal service every time."

"They are a pleasure to work with. Always ready to listen and help."

"Their people are very knowledgeable and personable, which means that you can have constructive and supportive conversations about the challenges faced in business."

"They have consistently worked hard to achieve the service levels we expect."

# A team for you

Our focus on relationships isn't just with our clients but also between our people too. We are a firm that challenges, motivates and rewards in ways that our people appreciate, to provide a greater sense of purpose and meaning through our work with you.

We collaborate and share information, we help and support each other and we always put the best team together to meet your needs. We have an ongoing commitment to creating a positive and inclusive environment for our own people.

This is what makes us an employer of choice. And that's also why we're ranked as a Best Company and as one of the **Sunday Times Top 100 Best Companies to Work For**.



# Our expertise

## Business services

We are able to meet all your business advisory needs across a wide range of specialist areas:



### Audit and assurance

- Statutory audits
- Non-statutory audits
- Data analytics
- Corporate governance and risk assessment



### Corporate and business services

- Accounts preparation and tax returns
- International trade
- Outsourced services and accounting solutions
- Management accounts
- Business and tax planning advice



### International tax

- International tax planning
- Cross-border projects
- Tax implications and regulatory risk
- Setting up business in the UK
- Individual tax liabilities
- Brexit implications



### Business tax

- Tax-efficient structuring
- Minimising tax on acquisitions and disposals
- Tax allowances and reliefs
- Tax-effective remuneration strategies
- Accessing finance including tax credits
- Research and Development tax credits
- Making tax digital advice
- Property tax



### Corporate finance

- M&A Lead advisory (disposals and acquisitions)
- Exit planning and management buy outs
- Finance raising and grant services,
- Strategic advisory services and Board support
- Business planning and modelling
- Due diligence
- Options appraisals and valuation



### Payroll

- Compliance with statutory requirements;
- E-payslip delivery;
- Secure portal function for input delivery and report collection;
- Real Time Information (RTI) submissions;
- Payroll P60 tax year end returns;
- Auto enrolment administration service



### Business recovery and insolvency

- Turnaround and recovery options
- Personal debt advice, bankruptcy and directors' liabilities
- Administration, liquidation and voluntary arrangements
- Creditor services



### Forensic and litigation support

- Dispute resolution and litigation support services
- Expert witnesses
- Fraud investigation and financial misrepresentation
- Professional negligence
- Loss and quantum valuations



### VAT

- Property transactions
- Buying and selling businesses
- Importing and exporting
- Brexit preparation
- HMRC liaison and guidance

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## Personal services

We are also able to meet all your personal needs across a wide range of specialist areas too:



### Independent Financial Advice

- Tax advice and financial forecasts
- Insurance and investment products
- Pension planning
- Inheritance tax planning
- Trusts



### Personal tax

- Tax-efficient strategies to reduce liabilities
- Income tax planning
- Personal financial reviews
- Maximising claims for relief against your income and gains
- Tax planning between spouses and civil partners



### Probate

- Managing assets and liabilities
- Preparation of all tax returns
- Applying for Grant of Probate
- Preparation of estate accounts
- Discharging liabilities and expenses
- Administration of estates

# Our business: at a glance



## Depth of talent

With 31 Partners and 370 people, we've got the capacity and expertise to meet your needs.



## Continued growth

We grew by 6.7% last year and have been one of the fastest growing firms in the last decade.



## 10,000+

Clients, including 1,250 new clients in the last 12 months.



## Leaders in our field

No.1 audit firm to academies in the UK education sector

## Exceptional! client service

We've been awarded Investor in Customers Gold.



## Award winning

We have a Best Companies ranking for outstanding employee engagement and have won multiple awards in the last 12 months.

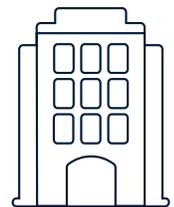
## Employer of choice



We've been ranked in the Sunday Times Best Companies to Work For rankings for the last four consecutive years.

## Corporate Social Responsibility

We're committed to making a positive impact on the communities we operate in and serve.



## 7 UK offices

Bath | Bristol | Exeter | Plymouth  
Torquay | Truro | Worcester



## National focus, international reach

Through our membership of Kreston International, we have access to a global network of independent accounting firms.

## Our sector expertise

We deliver services across a wide range of sectors



Automotive



Charities



Education



Financial services



Food & Drink



Healthcare



Leisure & Tourism



Manufacturing



Media & Creative



Professional Services



Property



Technology



To find out how we can help you or your business, please contact us:

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