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WHO ARE FORTUS?

To put it simply, we're business advisors and accountants with a proven track record of delivering support and advice to ambitious business owners and their businesses and have been doing so for over 40 years.

ARE YOU LOOKING TO ACHIEVE MORE IN YOUR BUSINESS?

If you need support to develop and grow your business, then you're an ideal Fortus client.

Our proposition isn't based on what sector you're in or even how big your business is - It's about your mindset as a business owner.

If you have the desire and courage to make decisions that drive your business forward, we can support you and your ambitions.





DIFFERENT FROM MOST ACCOUNTANTS?

We know business ownership can be complex and demanding - with daily challenges ranging from financial management, business improvement and recruiting & retaining people, to managing property, funding growth and strategic planning, to name but a few. At Fortus, we've got experts to help in all these areas and more, who'll share their insight and knowledge to help you grow yours.

When challenges land and people look to you for all the answers, we'll be by your side, using our own knowledge, strength and courage to help you find yours, supporting you and your team as you grow your business.

Crucially, our knowledge-led business advice is personal to you, <u>because...</u>

IT'S ABOUT YOUR BUSINESS
THE OWNER



PUSHING THE BOUNDARIES

We've spent years honing our skills, moulding and developing our business, through detailed planning, shared experience and most importantly, listening to our clients. And that's why Fortus exists today.

We have an ambitious, creative, experienced and dynamic leadership team who challenge the traditional thought processes of a historical accountancy model and push boundaries. A team that's growing – with people empowered to make their own decisions yet with the unwavering help and support of the rest of the team.

"WE HAVE AN AMBITIOUS, CREATIVE, EXPERIENCED AND DYNAMIC LEADERSHIP TEAM WHO CHALLENGE THE TRADITIONAL THOUGHT PROCESSES AND PUSH BOUNDARIES."

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ONE TEAM MANY TALENTS





OUR VALUES

How do we bring together over 250 people across 12 locations? Simple, our values and a strong collaborative culture are what bind us together. If you share, believe in, and are prepared to contribute to our values, you'll feel right at home at Fortus. Why?

Because we're...

DISTINCTIVE

We know what we do exceptionally well. It's our unique combination of skills, values and culture that make us distinctive. We're positively different and stand out for good reason.

INCLUSIVE

We respect, value and view people as individuals. We achieve what we do through collaboration, encouraging participation and new ideas.

VALUABLE

We understand what we do every day is worthwhile. We create tangible value for our clients and ourselves.

COURAGEOUS

We believe in ourselves and are confident in meeting challenges head on. We're not afraid to step into the unknown, but only do so, once we've weighed up all potential outcomes.



ACCOUNTS & OUTSOURCING

You shouldn't need an accountancy degree to run a business. Our most important role's providing you with accurate financials and helping you figure out what all the financial data means. We'll help you interpret the information intelligently and ensure you have rich data to make quick, well-informed decisions in your business. We'll make it easier to work out what information's key to your business, set KPIs and be there to work with you to ensure your accounts and data work harder for you and your business.



We moved to Fortus in 2015 and have been very impressed with the service we've received. On top of producing yearly accounts, the team have offered advice on all aspects of our business, including taxation, banking, bookkeeping software and contract creation. We really like this proactive approach and it's had a positive and measurable impact on our bottom line. Our company's gone from strength to strength and Fortus have been there every step of the way.



NOEL BRANDLEY

Design Director Mandek

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EXECUTIVE DIRECTOR

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AUDIT & ASSURANCE

Whether you currently have a statutory audit, or you are looking to add credibility, reassurance and governance in your business, an audit can add a huge amount of value to your business. Even if your business is under the statutory audit threshold and you don't legally need an audit, it can give you the reassurance that all's well in the business. Our audit approach is collaborative, painless and nondisruptive to your business. We'll give you a responsible and honest report on how your business is operating. It's not about finding fault but instead, highlighting risk and exposure, enhancing financial credibility and helping your business move forward.



HEAD OF AUDIT

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> 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

BUSINESS TAX

Tackling corporate tax with the right advice and planning can make a huge difference to the success of your business and mistakes can be very costly. Believe us when we tell you we can do so much more than tax compliance.

Whether it's VAT, R&D, Employment Taxes, Capital Allowances, Corporate Restructuring, Enterprise Management Incentives or International Tax, we've got a talented team with decades of experience to help.



We've been using Fortus for a few years now for both tax planning and HR support. As our business has been growing, it's great to be working with an organisation who've supported us along our journey. The team has been very proactive and approachable, which has helped us make quick and well-informed decisions.



PARM BHANGAL

Managing Director Bhangals Construction





BUSINESS PERFORMANCE IMPROVEMENT (BPI)

So, what do our business performance improvement specialists do? It's simple. As your business grows, you may find it hard to take a step back and really look at your business with a fresh pair of eyes. Our external business improvement specialists can help you improve processes, systems, reporting, automation and be there as your advisor to help you achieve cost savings and avoid your business hitting a growth ceiling. They'll ensure that you get the right information, at the right time to make better decisions in your business.

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We enlisted the services of Fortus last year to automate our Management Information Systems and provide clearer and more concise monthly reporting to the Board. It's a pleasure to work with the BPI team, - their work has transformed the efficiency and accuracy of our reporting. I wouldn't hesitate to recommend Fortus' services to others.

JULIETTE WITHEY

Director of Finance & Company Secretary Woods Hardwick



CORPORATE FINANCE

Many business owners don't understand what a full range of Corporate Finance services look like. To put it simply, if you're looking to build value in your business, buy or sell a company, raise finance or plan your succession, our Corporate Finance team can help. Our talented in-house team has an extensive network of contacts and an energy to match, to deliver impressive results, time and again.



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



We know only too well how important people are to the success of any business. That's why we offer HR, payroll & people services through our specialist team. Strengthening your own team, employee engagement, diversity, succession plans, and employer brand will increase your commercial growth, profitability and reputation, and that's what we want you to achieve. So, if you're looking for a more strategic approach to recruiting, retaining and developing your people, we're waiting to talk to you.



Fortus have been really helpful in steering us over the years from a small SME to a growing international business. Having their expertise on hand has been invaluable in professionalising the organisation as we've gone through various growth stages and formalised the necessary policies and processes to support our international growth. As a result, we see Fortus as very much part of 'our team'.



SIMON BEECHING

Chief Business Development Officer Syntec



KEIR

SENIOR HR CONSULTANT

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INNOVATION TAX RELIEFS



Many business owners still believe they won't qualify for R&D tax credits. In most cases, that misconception's simply wrong. R&D tax credits don't only apply to significant scientific breakthroughs in a handful of sectors. Whatever sector you operate in, if you're spending money on developing a new process, product or service internally or for a customer, you could qualify. Our Innovation Tax Reliefs team houses a wealth of experience gained both in practice and in senior positions within HMRC, providing a great combination of tax and industry-based experience. We think it's an ideal combination to have on the team advising you. Our average claim value for our clients is £75k, with our largest being £1.1m.



Working with the Innovation Tax Reliefs 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

INTERNATIONAL SERVICES

Whether you're a business already trading overseas, or an overseas business looking to trade in the UK, or even a business owner yet to accomplish your international ambitions, then our team are here to help. To ensure you receive top quality advice across the globe, we're part of the Morison Global community, the 10th largest international association of professional service firms, with over 300 offices in 75 countries.



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





PAYROLL

Paying your team on time's essential and there's nothing worse than when it goes wrong. Payroll today is about having the right technology and knowledge to deal with constant legislation changes and a varied workforce.

Outsourcing your payroll removes the cost of an in-house payroll specialist and saves both time and money. Our payroll experts are trusted by hundreds of SME's and provide peace of mind and security that your payroll's being handled by a skilled, specialist team.



The Fortus team have provided me with an excellent service over the past few years. They're a very approachable, efficient and capable team who go the extra mile.



RICHARD SMITH

Director

Waveney Valley Lakes (Norfolk)

PERSONAL TAX

The top of most people's list is keeping as much of the money they've worked so hard to earn and providing for their family. It's no mean feat to do that tax efficiently with ever changing legislation and a massive variety of rules.

When you're running your business, you don't want to have to stop and think whether the decision you've made is the most tax efficient for you. But we will. Work with us and you'll maximise your personal wealth, save money and safeguard your family.



When it comes to meeting my needs for expert professional advice in relation to accounting and more specifically tax advice and tax planning, I've found the Fortus team to be outstandingly professional, superbly knowledgeable and indeed experts in their field. They're focused on their client's goals and professional needs, delivering a superb client experience. I've recommended Fortus to many of my friends and colleagues all of whom have been extremely impressed.



ADIL AJUIED FRCS

Consultant

Fortius Clinic





PROPERTY

TOM
DYMOND
DIRECTOR HEAD OF PROPERTY



Not necessarily a service you'd expect from a business advisory & accountancy firm. But your property requirements can be a demanding but essential element in the smooth running of your business. That's why we've got it covered.

Whatever you need, whether it's finding the right premises, claiming back Capital Allowances or us negotiating a new lease on your behalf, our in-house team of Chartered Surveyors will get the most out of your property assets, and reduce your occupational costs.



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

SERVICE CHARGE

Whether you're a residential or commercial Managing Agent, Chartered Surveyor, Residential Management Company, Landlord or Housing Association, Fortus can help. Ensuring your procedures are robust, straightforward and fair is important, but we also know that supporting you is about much more than that. Success is also about your culture, your people, your objectives, challenges and aspirations.

Our clients' property portfolios include small single schedule blocks of flats, large complex developments with multiple blocks and schedules and complex mixed-use developments. Fortus' team provides services to over 1000 developments and we're recognised widely in the industry for our in-depth knowledge in this specialist sector. We're partners with ARMA and provide technical support to the trade association to help raise standards and we're also winners of Service Charge Accounting Firm of the Year and have been highly commended on a number of occasions. This follows a shortlisting at the 'NEWS ON THE BLOCK' Property Management Awards.



We have a strong and positive relationship with Fortus. We've worked with the team for years and know them to be knowledgeable and experienced in the sector, and importantly, flexible in meeting our needs. They demonstrate commitment in delivering a high-quality service, are great value for money and provide strong technical advice when needed.



KEVIN BARR

AIRPM - Director Freemont Property Managers



VAT

Whether you're a business owner or not for profit charity, our VAT experts can help you reduce the burden of dealing with VAT. If you need to register for VAT, mitigate penalties, maximise VAT reliefs or require advice with a VAT dispute, then we can help.

We have a team of specialists waiting to answer your questions and provide you with first class VAT services.



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



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WEALTH PLANNING & INVESTMENTS

When it comes to personal wealth, making great decisions today, can give you and your family what you need for a comfortable future. Whether it's advice around protecting or exiting your business, estate planning, IHT or pensions & investment advice, we collaborate with a variety of financial advisors, to ensure you get the best and most tax efficient financial advice

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HEAD OF TAX

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The Fortus team understand my needs as a business owner. They never waste my time by talking about services that I don't really need. I know that when I get advice, it's advice I can trust.



GAVIN MORTIMER

CEO

PRS Guitars Europe



ACADEMIES & EDUCATION

We understand the ever evolving challenges facing the world of education, including a system of complex regulations, funding issues, increased responsibilities and the pressures of demonstrating a robust and efficient spending of budgets. You can be confident that with Fortus, you'll have the right team of experts in place to deliver on the support you need in order to survive and thrive.

Our specialist Academy & Education Team provides comprehensive services across the UK education sector. We support a wide range of organisations including independent schools, single and multi-academy trusts.



Since our school first converted to an Academy seven years ago, Fortus has helped us every step of the way. The team are experienced, professional, highly approachable and always available - They're also always prepared to go the extra mile.



JANE PARR

Finance Manager Rothley C of E Academy

RICHARD

BUCKBY

DIRECTOR -NOT FOR PROFIT

07527 303313

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CONSTRUCTION & BUILT ENVIRONMENT

We're proud to support business owners across a diverse range of SME businesses that operate within the construction & built environment sector. Our portfolio of clients ranges from construction, engineering and architects to developers, contractors and sector suppliers.

We're business advisors in the true sense of the word, providing not only accountancy and tax services, but a huge amount more. Our advice and support extend to R&D tax relief, HR, talent, payroll, funding, business acquisition, succession planning and property. Our specialist Construction & Built Environment Team deliver innovative accountancy, tax and business advice to owners of companies within the sector.



Fortus' sector expertise was evident from day one and this resulted in a very smooth claims process. The team played a key role in educating our own internal team on R&D and helping us better track R&D time spent, which should help to maximise future claims.



DAVE SUMNER

Managing Director bsp Consulting

CREATIVE INDUSTRIES

Owning and managing a creative business can be exciting and fulfilling, but it can sometimes feel like an expedition into the unknown. Headed by Rob Quinn a former agency owner, we're passionate about businesses operating in the creative sector. We also love to design, create and innovate, so we've created a unique advisory team specifically to support owners of creative businesses.

We often see owners with truly brilliant creative minds, but who are so closely involved in every aspect of the business, they're not able to develop and implement a cohesive growth strategy. Whether that's help with funding, acquisitions or mergers, claiming creative tax reliefs, international growth, building new teams or diversification, our Creative Advisory Team will be able to give you the support and advice you need to help you achieve your ambition.



Fortus have been an integral business partner to Purity over the past 7 years, supporting us both domestically and internationally. Most recently they've taken us through a business improvement programme and by working with their Corporate Finance team, we've successfully completed on a MBO. The Fortus team understand Purity as a business, the industry we work within and the challenges it can present.



MARK DUNN

Managing Director Purity Productions





NOT FOR PROFIT & CHARITIES

Having advisors that know exactly the issues and challenges facing not for profit organisations today is vitally important. Our strength is in our team and their specialist sector knowledge. Whether it's changes in legislation, additional scrutiny or the need to communicate impact, our advice will help your organisation overcome many of these challenges and thrive.

Our Not for Profit & Charity Team supports a wide range of not for profit organisations across the UK. Our approach supports the health of your organisation, helps to ease compliance and improves your operational strength.



Fortus have helped us to improve our financial management systems and have been a great supporter of our charity – attending fundraising events and introducing us to other clients.



MATT LILLEY

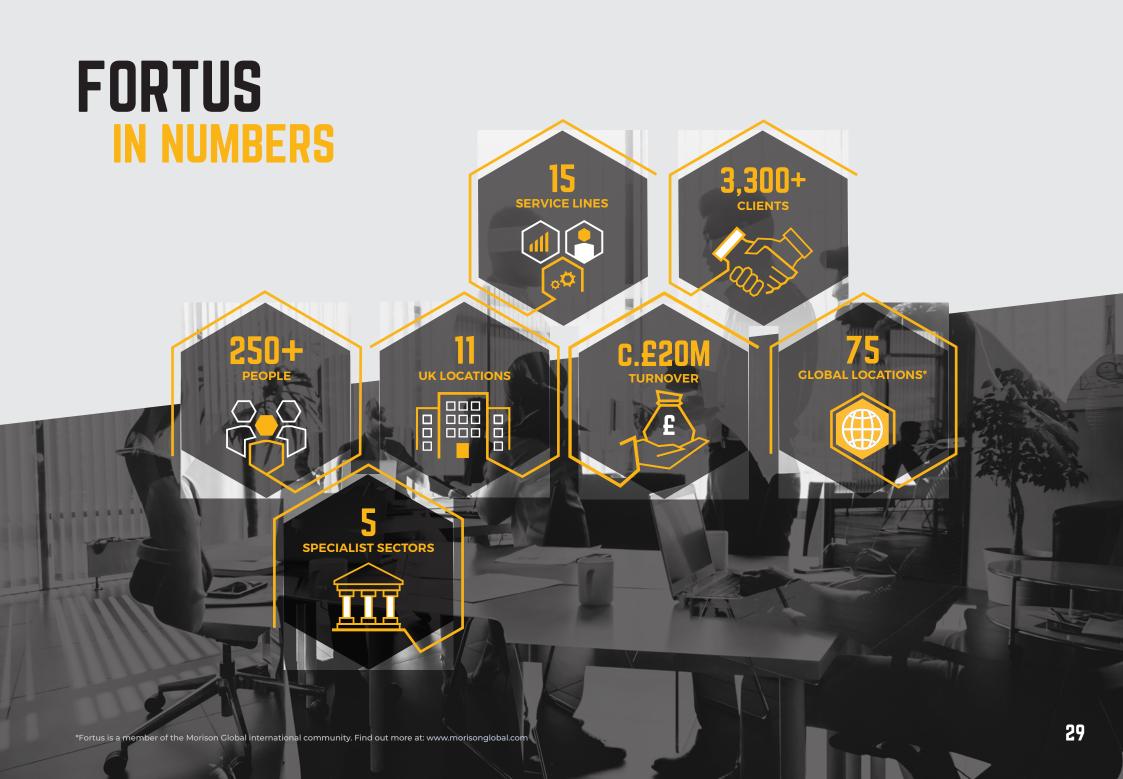
Chief Executive Focus charity



SPORT & ENTERTAINMENT

The world of Sport & Entertainment's fast-moving, highly innovative and, at times, very exciting. It needs calm heads and experienced minds to deal with the demands of running a successful business in this sector.

Headed by former international footballer and business owner Andrew Johnson, we're passionate about advising elite athletes, managers, business owners and their leadership teams who work in this industry. We understand the demands that come from working in high-performing teams surrounded by elite talent. We also know the value that a trusted advisor can bring to a company as it deals with everything that comes from this unique area of business.



FORTUS INSIGHTS

There's always so much going on day to day in business. As an owner so many challenges and questions land at your feet - but how do you keep bang up to date with everything you need to know? Simple, visit the Insights section of our website for up to date news and expert views.

We don't only provide financial information and advice on our website. Our Insights extend to areas such as Property, People, Business Performance Improvement, Risk, Tax, Research & Development, Funding, Growth, Acquisition, Strategic Planning and so much more.

Our experts have their finger on the pulse, constantly checking out what's happening and giving their views and advice on how to help you and your business move forward.

Visit us online at: www.fortus.co.uk/insights



STILL NOT CLEAR WHAT WE DO?

This brochure may have shown you that our roots stem from being accountants (and we believe, great accountants at that), but today we offer so much more. Because we recognise that a single speciality is no longer what business owners need to help them make courageous decisions to develop and grow their companies. That's why we offer a wide range of services to support you and your business. In doing so, we're not just accountants, we truly are business advisors.

We understand business advisors can be perceived as either high end, eye wateringly expensive consultants or are confused with the indistinct world of business coaches. We're happy to say, we're neither of those.

We'll support you throughout your business and personal journey, sharing our knowledge, and giving you strength, courage and support to deliver on your ambitions.



CONTACT INFORMATION

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WHERE KNOWLEDGE, STRENGTH & COURAGE DELIVER ON AMBITION