



SAFFERY CHAMPNESS, BRISTOL

Saffery Champness
CHARTERED ACCOUNTANTS



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Located in Clifton, with excellent transport links for easy access to the M4 and M5 Motorways, staff and Partners at our Bristol office advise clients throughout the city and surrounding areas, as well as more widely across the South West of England and into Wales.

Our Bristol office opened in 1998 and has since experienced significant growth. Its team advise a wide range of regional and national business organisations at all stages of growth and development, providing a comprehensive suite of services.

The team also advises private clients and estate owners on the financial and taxation issues that affect them. This is a core area of our business and we are practised at helping them face the challenges of protecting, maintaining and growing their assets in tax efficient and planned ways.

In addition to a broad range of accounting and tax services, the Bristol team has developed expertise and knowledge in a number of areas specific to the regional economy, and you will find details of these contained within this booklet.

We pride ourselves on our 'one firm' culture, which means that Partners and staff in our offices work as a team, drawing on specialist expertise throughout the UK. Partners in our Bristol office are members of the firm's Southern Regional Group, a network that works with the other offices in the Group – Bournemouth, High Wycombe and Peterborough – to deliver the most seamless and effective solution possible.

Private Wealth and Estates

Our team specialises in advising private clients in all matters relating to their personal wealth. We act for a broad spectrum of individuals and families, with clients ranging from successful entrepreneurs to estate owners and trusts.

We recognise the contribution of rural communities to the South West's economic life, and possess particular expertise in the financial considerations affecting landed estates and farms. We assist these clients with all aspects of their affairs, advising on issues such as business planning, diversification strategies and wealth preservation.

In addition, Saffery Champness acts for individuals based overseas and frequently advises them on the tax aspects of their purchases of land and buildings in the South West, as well as providing access to offshore support and expertise through the fiduciary services of our Guernsey or Geneva office where appropriate.

Services to Businesses

We provide accounting and taxation services to businesses across a broad range of sectors and owner managed, medium sized, family owned and publicly quoted businesses are well represented in our client portfolio.

Services provided by our Bristol team range from assisting with statutory requirements via audit and corporation tax services, through to the provision of specialised advisory services in niche areas that require high levels of technical knowledge and expertise.

Corporate Finance

At our Bristol office you will find practitioners experienced in handling all types of corporate finance transactions. We have helped companies grow and develop through transactional activity and are able to assist when focus turns to unlocking the capital held within a business.

Our firm has the capacity to advise on all types of deals for privately owned and quoted businesses and also act for the latter on many of the market related issues affecting them, including takeover and restructuring issues. Our Bristol team has experience of all UK markets and has been involved with a number of AIM admissions.

Regulated deal advice is provided by Saffery Champness Corporate Finance Limited, which is authorised and regulated by the Financial Services Authority.

Media and Entertainment

The South West is home to a growing number of practitioners and companies involved in the creative industries and we advise many clients active in media, entertainment and associated services.

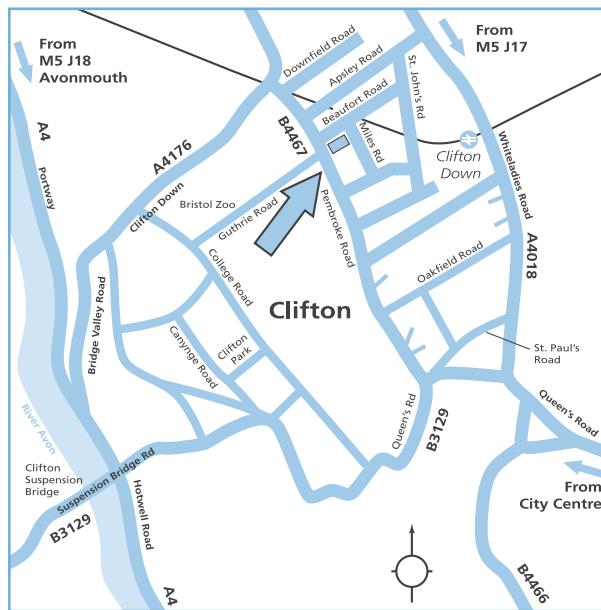
We are familiar with the range of issues posed by this creative and competitive sector, and our clients include publishers, broadcasters and production houses, as well as people and organisations active in the business of sport.

Not for Profit

Many of our clients have interests of a charitable or non profit making nature, and we are often asked to advise on issues relating to these. We possess considerable expertise here and, as well as charities, advise many independent schools and representative associations.

We are also able to help not for profit clients claim VAT savings where money is due to them and our firm has experienced considerable success in this area.

This brochure offers a broad overview of the services we can provide. If you would like to learn more and discuss your specific needs, please contact us.



Tel: 0117 915 1617 Fax: 0117 915 1618

Beaufort House, 2 Beaufort Road, Clifton, Bristol BS8 2AE

infobri@saffery.com www.saffery.com

The firm is regulated for a range of investment business activities by the Institute of Chartered Accountants in England and Wales. Saffery Champness is a member of Nexia International, a worldwide network of independent accounting and consulting firms. Saffery Champness Corporate Finance Limited is authorised and regulated by the Financial Services Authority.



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BRISTOL, OUR PEOPLE



David Lemon, ACA

A Partner in the Bristol office, David has worked in the South West region throughout his career. David advises growing entrepreneurial businesses and looks after a mixed portfolio of corporate clients from a variety of sectors. In addition David has specialist knowledge of the media, entertainment and sports industries. He has extensive experience in advising clients in matters ranging from business strategy to their audit, accounting and tax needs, and his clients include companies operating within television production and media, professional sport, retail, professional services, manufacturing and technology.

David is also the Bristol office's Audit Technical Partner and a member of the firm's national Audit Committee, which is responsible for the delivery of audit services to clients. He is also a member of the firm's Media and Entertainment Practice Group



David Wragg, FCA

David is a Partner in the Bristol office who provides corporate and commercial services in the South West region. He specialises in corporate finance and advising owner managed business across a wide spectrum of industries. David has extensive experience of providing advice to family owned businesses and multinational PLC's alike.

David is an associate member of the British Venture Capital Association and a member of both the Corporate Finance Faculty and the Financial Services Faculty of the ICAEW. Previously he held the position of IOD Vice Chairman for the South West Region, together with Non Executive Director positions for a number of not for profit businesses and economic support organisations in the region.



BRISTOL, OUR PEOPLE



Richard Cartwright, CTA

The Tax Partner in the Bristol office, Richard is a Chartered Tax Adviser and acts for a wide range of clients, from wealthy individuals and families, including rural landed estates and senior executives of national companies, to owner managed businesses based in the South West.

He provides tax advice to his clients as well as being closely involved in the tax advice given to the other Bristol Partners' clients. Richard heads up the Bristol Tax Team and is responsible for the delivery of the tax services from that office.

Contact Bristol office:

Tel: 0117 915 1617

E-mail: infobri@saffery.com

www.saffery.com