



SAFFERY CHAMPNESS, INVERNESS

Saffery Champness
CHARTERED ACCOUNTANTS



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Established in 1980, the Inverness office of Saffery Champness advises a wide range of commercial and private clients. Our clients are involved in many areas of the Highland economy and in many instances we provide a tailor-made service for all aspects of their connected affairs: personal, family and business.

The range of issues facing involved in amassing and utilising capital are potentially exhaustive and helping our commercial and private clients meet these challenges effectively is a cornerstone of our practice. Services provided by the Inverness team range from assisting with the financial and tax compliance requirements for companies and individuals by setting-up efficient tax-planning structures and processes, through to providing highly specialist financial advice in conjunction with other professionals.

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 Inverness office are members of the firm's Northern Regional Group, a network that works with the other offices in the Group – Edinburgh, Manchester and Yorkshire – as necessary and appropriately deliver the most seamless and effective solution possible.

As one would expect, Partners and staff in our office also possess expertise in the laws affecting the finances of businesses, agriculture and land that are particularly unique to Scotland.

Services to Businesses

We provide accounting and taxation services to small and medium-sized companies across a broad range of sectors. Family-owned businesses are also well-represented in our client portfolio, and we are able to advise on all aspects of the planning, diversification, growth and succession issues that may be faced.

Services provided by our Inverness team range from assisting with statutory requirements via audit, corporation tax and assurance services, through to the provision of specialised advisory services in niche areas that require high levels of technical knowledge and expertise. We can help you and your company stay abreast of evolving legislation and take advantage of any opportunities resulting from this type of change.

We are also able to assist with all types of corporate finance transactions, by both managing deals on behalf of clients, and by providing analytical and investigative due diligence services to ensure issues are resolved prior to completion. We operate throughout Scotland and its Highlands and possess experience of operating within its prominent sectors.

Construction, Real Estate and Property

We offer a broad range of services related to the business use of commercial and residential property and our firm provides ongoing accounting and tax advice to a wide range of people and organisations active in this sector. We can, for example, ensure compliance with industry obligations, help with the tax implications of your purchasing and structuring decisions and advise on VAT issues.

Saffery Champness also possesses particular expertise in the application and use of all property-owning structures and property investment funds. We are proficient in helping with the tax-effective financing of transactions, with clients ranging from large funds to smaller syndicates becoming involved in property investment for the first time.

Private Wealth and Estates

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

We recognise the contribution of rural communities to Scotland's economic life, and possess particular expertise in the financial and tax considerations affecting landed estates and farms. We advise estate-owners across Scotland on all aspects of their financial affairs and assist them with a range of issues. These range from bookkeeping, tax, VAT and administrative matters, through to assisting with business planning and diversification strategies.

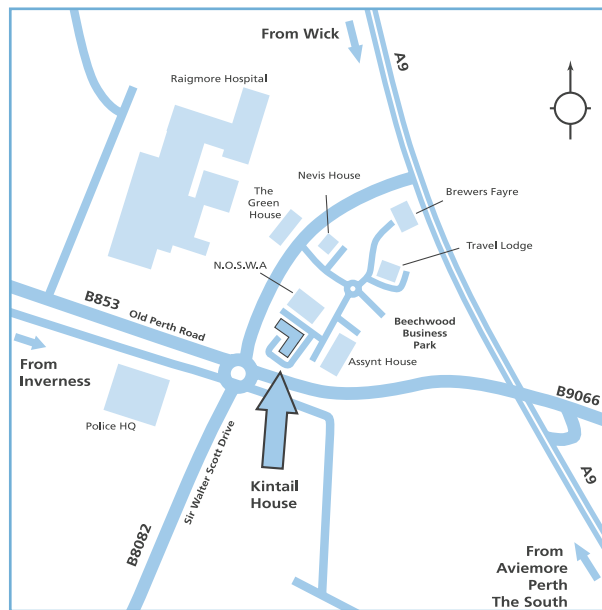
Saffery Champness acts for individuals based overseas and frequently advises them on the tax aspects of their purchases of land and buildings in Scotland, as well as, where appropriate, providing access to offshore support and expertise through the fiduciary services of our Guernsey office. Many of our clients have interests of a charitable or non profit-making nature, and we are often asked to advise on issues relating to these. This is an area in which our firm has considerable expertise and one in which we are more than happy to assist.

Renewable Energy

Our expertise in agriculture and construction lends itself well to the task of helping companies and individuals realise the commercial opportunities of renewable energy. This is an area in which advance planning can significantly reduce tax exposure, and we are able to assist with schemes of all sizes, from industrial-scale projects through to smaller ventures.

With renewable energy schemes often requiring property, estate planning and legal expertise, we are also practiced at working smoothly in conjunction with other professionals to ensure projects are completed to timescale. We can also recommend the use of appropriate structures, such as trusts, funds and companies, utilising our offshore planning expertise where appropriate.

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.



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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.



INVERNESS, OUR PEOPLE



Susie Swift, ACA

Senior Partner at the Inverness office, Susie specialises in advising private clients, landed estates and commercial entities both in the Highland region and throughout the rest of Scotland. Her clients are involved in most areas of the Highland economy. Susie has extensive experience in helping businesses to grow whilst providing financial advice for the whole family.

In addition to her responsibilities with the firm, Susie is married to a farmer and so has an additional interest in agricultural and sporting matters.



Shirley Mathieson, FCCA, CTA

A Partner at the Inverness office, in addition to running her client portfolio Shirley is responsible for the office's Tax Department. She advises a wide client base that is involved in most areas of the Highland economy. Shirley provides specialist accounts and tax advice to private clients, landed estates and commercial organisations.

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