

An abstract graphic of a blue liquid splash, possibly water or oil, moving from the top left towards the bottom right. The splash is rendered with a gradient from light blue to dark blue, creating a sense of motion and depth. The background is a solid dark blue.

Navigating  
complexity.  
Creating  
opportunity.

Professional Services Welcome to S&W

S&W

# Navigating Complexity. Creating Opportunity.

**S&W works with businesses and individuals to navigate challenges, unlock potential and achieve the extraordinary. Since 1881, we've been a trusted partner, supporting clients with complex needs and shaping solutions that make a difference.**

In a changing world, we are a consistent presence, building lasting relationships and serving our clients across the UK, around the world and over generations.

For companies, private clients and families, we're here to help build a better future.

## Contents

Welcome to S&W	3
Working with you	4
<b>For the business of life and the life of business</b>	<b>5</b>
For every stage of the business	5
For you, your family and your business	5
<b>Business tax</b>	<b>6</b>
<b>Assurance and business services</b>	<b>7</b>
<b>Advisory services</b>	<b>8</b>
Corporate finance and transactions	8
Distress and investigations	8
<b>Consulting and digital</b>	<b>9</b>
Transformation and value creation	9
Risk and regulations	9
<b>Personal tax</b>	<b>10</b>
Private client services	10
Right there with you	11



# Welcome to S&W

**For over 145 years, we've built a legacy on expertise, simplicity and an unrelenting commitment to client success.**

As one of the UK and Ireland's fastest growing accountancy and advisory firms, S&W provides support across every stage of business and season of life:

- Serving ambitious businesses throughout their journey, from growth, through risks and change or to successful exits
- Supporting individuals in their personal and professional lives, realising their goals for themselves, their families and their businesses

Across tax, accountancy, assurance, advisory, corporate finance and consulting and digital services, our specialists provide expert advice and support at every stage.



145+ years supporting businesses across the UK and Ireland



One of the UK and Ireland's fastest growing accountancy and advisory firms



140+ UK and Ireland partners



25,500+ clients



2,000+ colleagues across offices in 18 towns and cities



A founding member of the international CLA Global network



A member of Oaklins International, Inc., one of the world's more experienced mid-market M&A advisers.

Working with you

# Working with you

We are a business built on expertise, driven by ambition and defined by purpose: Helping clients across the UK and internationally navigate challenges and seize opportunities.



## Trust

Independent advice and a partnership rooted in reliability, transparency and an unrelentingly focus on your best interests.



## Expertise

Dedicated, experienced teams working in specialised fields so businesses and private clients benefit from the highest level of expertise.



## Collaboration

A fully integrated approach with a lead expert providing a consistent contact to coordinate support and introduce you to the right specialists at the right time.



## Coverage

With offices across the UK and Ireland and international support through CLA Global's network of offices worldwide.

For the  
business  
of life and  
the life of  
business



# For every stage of business

Support and services for corporate clients across every aspect of business. We help businesses grow faster, reduce risks, optimise operations and maximise their value.

## Accelerate growth

Expert, tailored and specialist services and advice for ambitious businesses across funding, acquisitions and international expansion, to achieve and accelerate sustainable growth.

## Manage change and risks

Manage risks, build resilience and optimise operations with advice and services for the everyday and the extraordinary across tax, audit, accounting, risk, corporate finance, transactions and technology.

## Preparing for exit

From pre-exit planning to finding a buyer, due diligence and post-sales support, we help realise businesses' value, defend positions, avoid price deductions and close the deal.

# For you, your family and your business

A partner through life, for life: Through wealth creation, preservation and succession, we've supported private clients, secured their families' futures and guided their businesses for over 145 years.

## You

For everyday needs and life-changing events, we bring expertise, clarity and confidence to protect your assets, seize opportunities, manage complex tax requirements and achieve your goals.

## Your family

For generations, we've worked with families, estates and family offices to manage life's challenges with strategies that provide for their needs, pass on wealth, protect their values and ensure lasting legacies.

## Your business

We help clients grow their businesses to develop their legacy, manage risks to protect their personal wealth, and plan exits or successions to secure the future for themselves and their families.



Visit our website to find out more:

[www.swgroup.com](http://www.swgroup.com)

Business  
tax

# Business tax

## Keeping businesses on top of changing tax requirements

From family businesses to global groups, we help implement efficient tax plans, effective systems and confident compliance strategies. We keep clients up to date with the latest rules, help them minimise liabilities and make the most of available reliefs.

For owner-managers, entrepreneurs and family businesses, our comprehensive, integrated services meet professional and personal needs. For corporate clients, our integrated advice and flexible solutions enhance, support and supplement internal teams. Across all our services, we simplify complex requirements, identify opportunities to boost efficiency and reduce risks. We forge long-term partnerships and work to truly understand clients' operations, objectives, constraints and complexities.

### Tax risk and governance

We develop and implement robust frameworks to improve compliance, assurance and resilience, addressing risks from the corporate criminal offence, senior accounting officer regime and the business risk review (BRR+) process.

### Corporate tax services

Our support covers all aspects of the corporate tax regime, from registration to returns and reporting. Whether it's for day-to-day tax tasks or M&A and major change, we keep clients compliant and efficient.

### International tax

We help clients expand into new markets, acquire businesses abroad or enter the UK from overseas. From transactions to transfer pricing, we handle businesses' cross-border tax issues.

### R&D reliefs

S&W can optimise your R&D reliefs. We help identify qualifying R&D expenditures, submit claims and defend them to maximise R&D returns and minimise risks.

### Indirect tax services

Get help managing the indirect taxes that impact day-to-day operations, whether it's VAT, excise duties, environmental taxes or insurance premium tax.

### Business rates

Use us to check, challenge or appeal business rates liabilities on commercial property, one of the largest operational overheads for businesses.

### Employment taxes

Our proactive, practical support helps employers ensure compliance with employment taxes, manage risks, optimise their benefits and incentives, and support international workforces.

# Assurance and business services

## Move beyond compliance to build credibility and value

S&W's accounting, assurance and audit teams deliver more than robust compliance. We provide clarity, uncover opportunities and protect reputations.

Whether you need regulatory audits or reports, standards-based assurance or expert accounting services for acquisitions, disposals or equity issues, our services build on decades of experience and expert insights. We mitigate risks, bring transparency and build trust with regulators, investors, employees and other stakeholders.

**Audit and assurance teams** provide statutory audit, regulatory reporting services and standards-based assurance, non-statutory audit and corporate reporting. Our services provide more than compliance. We help enhance trust, uncover value and provide expert insights into systems, processes, internal reporting and teams. Bringing comfort to regulators, investors and other stakeholders, we help businesses identify issues and opportunities to mitigate risks and improve performance.

**Accounting advisory** enables clients to overcome complex financial reporting challenges resulting from business growth, organisational change and evolving regulations. Businesses rely on us to interpret and apply accounting standards and understand financial reporting impacts and options around transactions and contracts.

**Outsourced Services** help businesses boost efficiency and focus on core operations to enhance value. Across accounting and finance, payroll, compliance and company secretarial, we use market leading technology to deliver services that cut costs, reduce regulatory risks and provide access to improved expertise and specialist skills.



Advisory  
services

# Corporate finance and transactions

## Sealing the deal with experience and expertise

Corporate finance works across M&A, debt advisory, growth capital and international expansion to help businesses manage risks, realise value and optimise outcomes. Whether raising funds, seeking to sell or making an acquisition, we provide holistic services, international capabilities and expert advice and support to avoid pitfalls, smooth the process and achieve the deal objectives. We help businesses drive growth through strategic advice, expert planning and connections, matched with a global reach and execution through our membership of Oaklins International.

**Corporate finance** experts draw on technical expertise, industry-specific experience and decades working with capital markets to deliver value for our clients. We help businesses drive growth through strategic advice, expert planning and connections S&W gives access to global cross-border execution capability to help you achieve your goals efficiently.

**Transaction advisory services** enable our clients to navigate the risks and complexity of

transactions and secure the deal objectives. Across due diligence and sale and purchase agreement advice services, we defend clients' positions, ensure a smooth transaction process and help realise the business's ambitions.

**Debt advisory experts** provide independent, conflict-free advice, whether you're raising new finance, refinancing, amending existing facilities or restructuring existing loans. We help uncover and evaluate

options and provide seamless execution support.

**Business valuation services** provide clients with robust values for shares and operating assets for acquisitions, integrations, reporting, regulatory requirements, divestments, disputes and business exits. Bringing commercial, tax, accounting and litigation expertise we'll guide you through the process and provide a valuation analysis tailored to your needs.

# Distress and investigations

## The right choice when things go wrong

For businesses facing financial difficulties, those that have been targeted by crime or are involved in disputes, our technical skills and commercial experience help get the best possible results from even the worst situations.

**Restructuring and recovery** services seek to regain control and avoid insolvencies. Our specialists can clarify options for restructuring and turnarounds, engage with creditors and address business critical issues. Where unavoidable, qualified insolvency practitioners support businesses through rescues via administrations (or other available procedures) or winding-up.

**Forensic accounting** services help find the truth and bring clarity for all parties in cases of commercial disputes, fraud, financial crime and litigation. Our specialists support business leaders, lawyers and other professionals with investigations, valuations and dispute resolution across commercial, private client and personal injury cases.

Consulting  
and digital



# Transformation and value creation

## Embracing change, challenges and opportunities for growth and efficiency

Our consulting services help companies cut through complexities and drive meaningful change. Seasoned professionals bring technical expertise, cutting-edge technology and industry experience for focused, commercial solutions that answer your business needs.

**Business consulting** supports businesses across growth, change, transformation and turnarounds. We help companies tackle underperformance, optimise working capital, increase operational efficiency and build enterprise value. We also support leadership teams preparing exits and help with post-merger integrations.

**Technology advice**, strategy and implementation services help businesses thrive in a digital age. We deliver robust platforms, applications, solutions, develop strategies for efficiency gains, operational improvements and growth. We can empower your people, optimise operations and simplify compliance.

**Data solutions** optimise clients' data assets, deploying deep analytics and harnessing data intelligence. We unlock the value of data and visualisation to drive effective decision-making, streamline processes and satisfy regulatory requirements. We can help businesses harness their data to enhance performance and predict, adapt and lead in a changing world.

# Risk and regulations

## Resilience and confidence to manage risks and regulation

We work with businesses to build resilience, manage risks, safeguard their intellectual property and personal data, and bring efficiencies and confidence to compliance. We bring clarity to complex risks and regulations and help develop robust controls and protections that enable rather than encumber the business.

**Risk advisory** services help businesses meet the challenge of operating in an increasingly complex and uncertain environment. We seek to protect and enhance the value of our clients' businesses, embedding good governance, risk management and third-line assurance as an integral part of business as usual activities.

**Regulatory consulting** supports regulated financial businesses to develop and manage their regulatory compliance environment. Our specialists advise firms on becoming regulated, managing regulatory change and developing governance systems and processes to enhance operations and minimise regulatory risk. We bring a collaborative attitude and fresh insight to help firms enhance their business and manage this complex and crucial landscape.

**Cyber security services** protect your business today and drive growth tomorrow. We take cyber strategies beyond risk mitigation: Enabling efficient, innovative, secure processes and operations; simplifying regulatory compliance; managing security investments effectively; and demonstrating strong security standards to win and retain business.

# Private client services

## Navigate the complexities of personal tax

Through life's challenges and tax changes, we help our private clients maximise their wealth, protect their assets and pass on a legacy to future generations. Faced with ever-increasing scrutiny and an interconnected world, we ensure clients' tax affairs are efficient, compliant and aligned with their ambitions.

From preparing returns to planning, structuring and successions, our personal, bespoke services address immediate needs and long-term goals.



### Planning

We put in place effective plans to minimise exposures, protect wealth and maximise potential. We've worked with families over generations to pass on and preserve their legacies. Whether it's trusts and estate planning, a business succession or exit, or international issues, we can help secure your financial future.

### Compliance

Our personal tax compliance services help clients keep up with changing regulations and prepare and file their self-assessment returns in good order and on time. Expert, experienced practitioners ensure clients meet reporting requirements, pay taxes due and make the most of available reliefs and allowances.

### Disputes

If disputes arise, it can be a worrying time. Let us relieve the stress and hasten resolutions of disagreements with HMRC. Robust planning and compliance help our clients reduce risks and avoid triggering enquiries. Where they occur, we offer advice and support so clients only pay what is due.

S&W provides integrated advice and a seamless solution. We address complex tax and financial affairs with expert teams, helping clients become effective stewards of their assets and the interests of generations to come.

Our specialists bring experience for individuals, business owners and entrepreneurs, family offices, rural and landed estates and partners in professional practices across the UK and overseas. Our US tax

practice and a worldwide network of over 15,000 professionals through CLA Global can manage your international interests, wherever they are.

Whatever your requirements, we have relevant, experienced and tailored expertise on hand and ready to help.

Right  
there with  
you

# Right there with you

Globally connected. National reach. Local touch.

Across the UK and Ireland, our local offices support businesses and individual clients, helping them navigate complexities and challenges, and seize opportunities to thrive.



To find out more,  
visit us at:

[www.swgroup.com](http://www.swgroup.com)



Navigating complexity.  
Creating opportunity.



[www.swgroup.com](http://www.swgroup.com)

Issued by the S&W group of companies (the “Group”) which comprises S&W Partners Group Limited and any subsidiary of S&W Partners Group Limited from time to time. Further details about the Group are available at [www.swgroup.com](http://www.swgroup.com). Registered in England at 45 Gresham Street, London EC2V 7BG. No. 04533948

S&W Partners Corporate Finance Limited is authorised and regulated by the Financial Conduct Authority