



# M+A Partners

- + Chartered Accountants
- + Tax Specialists
- + Business Advisers

## Corporate Services

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M+A Partners' approach to corporate services is unique. We have developed a dedicated entrepreneur focused team of highly experienced specialists, working closely together to deliver seamless, proactive and efficient planning, finance, accounting and taxation advice to business owners and management.

### What M+A Partners can do for you

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#### + Corporate Finance and Business Strategy

Buying, selling and valuing companies or raising money are not everyday occurrences. Our team members are highly experienced in corporate finance, valuation and strategic advice and are there to guide you through the process, working together to achieve your intended outcome.

#### + Tax Planning

Taxation is a major cost of running a successful business. We develop, maintain and adapt an ongoing tax efficient strategy to reduce that cost throughout the life of the business.

#### + Management Information

A business without management information lacks an informed insight into where it has been and where it is heading – making future planning a more challenging process. By combining experience with accounting data we help ensure your business stays on track.

## Corporate Finance and Business Strategy

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**M+A Partners** Corporate Finance services are headed up by Partner, Scott Lindsay. Scott and our other experts work as part of your team to deliver objective and knowledgeable advice, supporting your strategies and maximising the value of your business.

Our advice is tailored to your exact requirements, be it arranging a £500,000 bank loan, through to acquisitions and disposals in excess of £100 million. It falls into four broad areas:

### Maximising value

- + Preparing businesses for ownership change
- + Identifying and negotiating with domestic and international buyers

### Raising funding

- + Optimising the terms from banks and lenders
- + Management buyouts / buyins
- + Introducing new investors
- + Listing onto the Alternative Investment Market

### Supporting growth

- + Developing organic and acquisitive growth strategies
- + Identifying potential acquisition targets
- + Securing optimal structures and funding terms

### Strategic planning

- + Assessing a company's options
- + Business modelling, company valuations and financial due diligence
- + Shareholder dispute resolution

## Tax Planning

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We can assist in all aspects of business taxation through start up, growth and expansion to eventual succession, retirement and exit sales. Senior Tax Managers, Sam Holloway, Faith Pearce and their teams manage all annual tax compliance and planning services, providing expert guidance and advice across a range of services including:

- + Tax optimisation for corporate groups
- + Business structures
- + Business acquisitions/expansion
- + Business disposals and exits
- + Employee Ownership Trusts
- + R&D and Patent box
- + Business property transactions
- + Reorganisations and demergers
- + Succession and Inheritance Tax
- + Employee incentives and share ownership
- + Remuneration planning
- + Tax due diligence

## Management Information

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A varied portfolio of clients are realising the importance of relevant and timely financial reporting – we deliver the support and know-how to achieve this. Senior Accounts Manager, Megan Roddis, leads a team with a wealth of experience in producing accurate and instructive management information.

Having the right accounting software in place is a key contributor to ensuring clear insights into your business financials. Accounts Assistant Manager, Alice Williams, is one of our expert points of contact when it comes to identifying the right software package for your needs. Our team provides virtual finance manager support and, as an accredited partner, training and advice in optimising the latest digital and cloud accounting packages. Our services include:

- + Accounting systems advice and installation
- + “Virtual” Finance Manager
- + Management Accounts
- + Projections and cash flow forecasts
- + Training and support
- + Regular systems health checks
- + Outsourced bookkeeping
- + VAT returns and planning

This is an outline of our **Corporate Services**, for more information please get in touch with one of our experts.



**Scott Lindsay**  
Partner

✉ [Scott.Lindsay@mapartners.co.uk](mailto:Scott.Lindsay@mapartners.co.uk)



**Faith Pearce**  
Senior Tax Manager

✉ [Faith.Pearce@mapartners.co.uk](mailto:Faith.Pearce@mapartners.co.uk)



**Sam Holloway**  
Senior Tax Manager

✉ [Sam.Holloway@mapartners.co.uk](mailto:Sam.Holloway@mapartners.co.uk)



**Megan Roddis**  
Senior Accounts Manager

✉ [Megan.Roddis@mapartners.co.uk](mailto:Megan.Roddis@mapartners.co.uk)



**Alice Williams**  
Accounts Assistant Manager

✉ [Alice.Williams@mapartners.co.uk](mailto:Alice.Williams@mapartners.co.uk)



# Partners

**Our Vision** - to be the firm of choice,  
through our team fulfilling their potential  
and delivering exceptional client service

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01603 227600  
enquiries@mapartners.co.uk  
mapartners.co.uk

MA Partners LLP  
7 The Close, Norwich NR1 4DJ

Norwich | Attleborough | Cromer



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