

BW INSIGHT, OUR BUSINESS ADVISORY SERVICE, DELIVERS REAL TIME ADVICE BASED ON REAL TIME INFORMATION.

WE WORK WITH YOU TO FOCUS ON THE KEY NUMBERS FOR YOUR BUSINESS. WE LOOK AT THEM IN REAL TIME AND USE OUR INSIGHT TO PROVIDE REGULAR PRACTICAL ADVICE YOU CAN ACT ON RIGHT AWAY. ADVICE THAT GIVES YOU FIRM FINANCIAL CONTROL, LETS YOU TAKE CONFIDENT BUSINESS DECISIONS, AND DRIVES BUSINESS IMPROVEMENT.

With oversight of your digital business records and regular communication, we work together to improve cashflow management, evaluate finance options, consider funding opportunities, provide forecasts and analyse budgets.

Better business performance is the goal.

Insight is tailored to you. It is dependent on the management information you need and how often you would like us to provide, analyse and review it with you, but as a guide, we offer three service

levels, FOCUS, ENHANCE and VISION. The services are outlined below and our policy on costs is straightforward. We will be clear from the outset what your service includes and its monthly cost.

Talk to us today, without obligation or cost, about improving your business performance.

Call Stuart Hulland or Kay Brookes on 01332 365855 or email BWInsight@batesweston.co.uk

FOCUS

We work together to highlight the key numbers for your business. Those that show its financial health, flag problems ahead or identify tax planning opportunities. We produce detailed and reconciled management information in a monthly or quarterly FOCUS report.

ENHANCE

We will analyse your FOCUS reports, and discuss them with you in person in a quarterly or monthly meeting whichever you prefer. We will explain what your numbers mean and what actions can be taken to improve your business performance.

VISION

Add forecasting your future position to the ENHANCE service to consider "what if" scenarios and understand the financial impact of decisions before you take them. We will compare actual results to forecasts too, to highlight unexpected costs and business performance, giving a vital heads up.

PLAN AHEAD

With your business performance secure, we encourage you to look to your future. Talk to our specialist tax, corporate finance and pensions and investment teams about expansion, succession, structure, retirement and building and protecting your wealth for your dependents.

BW INSIGHT IN PRACTICE

ANNUAL
ACCOUNTS
TAX RETURNS
VAT RETURNS

SALES · DEBTORS
DIGITAL
RECORDS
COSTS · CREDITORS · PROFITS

BETTER
BUSINESS
PERFORMANCE

KEY INDICATORS

PLAN AHEAD

SUCCESSION · SALE · FAMILY · RETIREMENT · EXPANSION · CLEAR
FUTURE

THE BW APPROACH

We give practical financial and tax advice to business owners. We are curious, likeminded and straight talking. We are happiest when we are helping clients to take opportunities or head-off problems. Partner led, qualified and experienced teams with in house specialist tax, corporate finance, pensions and investments advisors and services like payroll and bookkeeping, mean that you and your business can get all the help you need in one place.

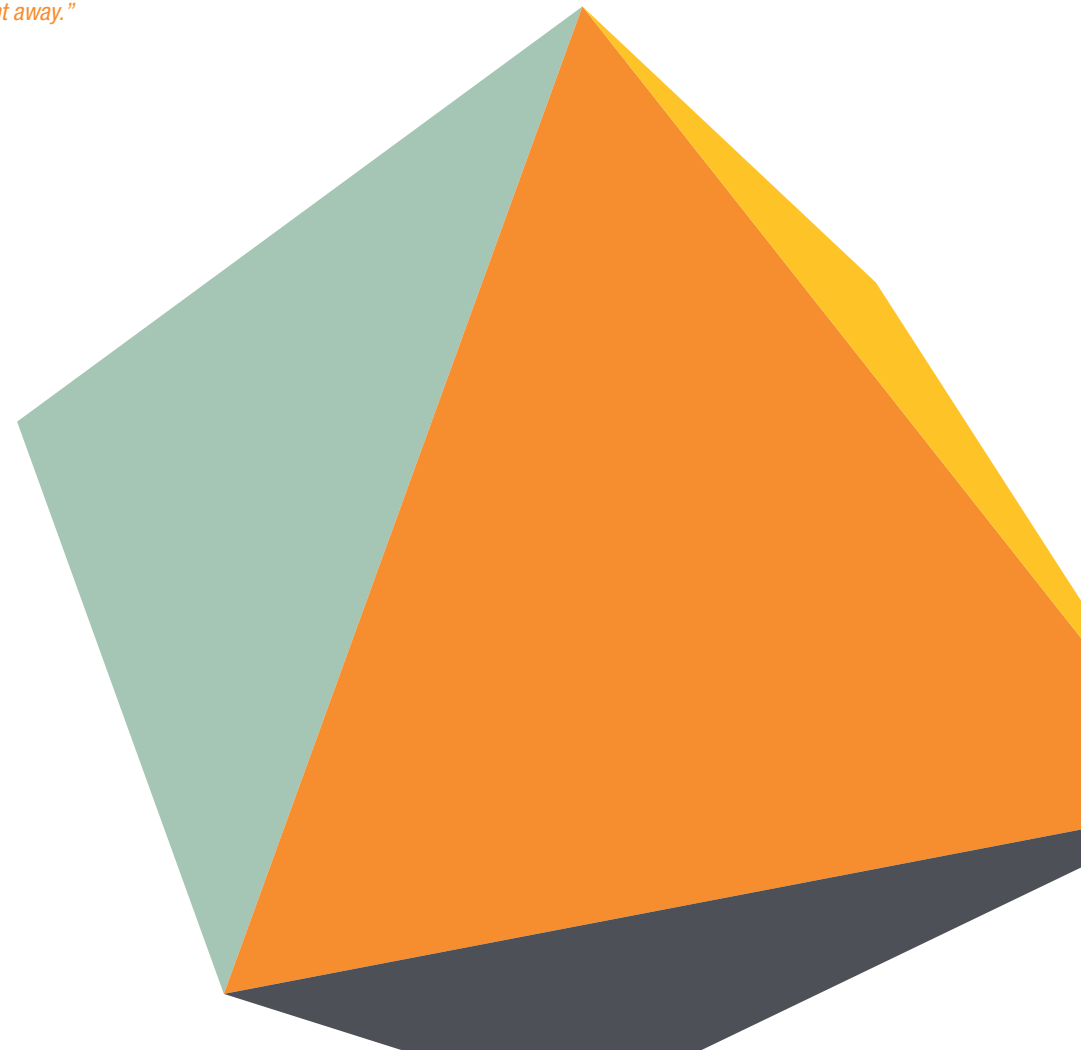
Helping businesses improve their cashflow and profitability is what we do. We use efficient technology, particularly when it means we can give timely advice. Our clients know we have their backs. But don't take our word for it.

Here is what Gary Supple, Managing Director of Glebe Homes has to say:
"Bates Weston have been an invaluable part of our team. They help us to keep a firm grip on our financial position and give us insight and guidance on our longer-term plans. They are always there to help us, and never more so than during the Covid-19 pandemic. They helped us make sense of and access the business support packages available, including the Bounce Back Loan Scheme, helping us to manage cashflow and taking us through the furloughing process. They make a real difference to our business and we have no hesitation in recommending them."

Adrian Radford, Managing Director of Key Survival Equipment, was an early adopter of our BW Insight service, though it wasn't called that at the time! Adrian comments:
"Having Bates Weston working alongside us, gives us peace of mind. We know our financial position in real time, we forecast our cashflow position and we can see how our business is performing, taking action to address potential problems before they arise or making the most of new market

opportunities with a clear understanding of the likely financial impact. Here's an example. Our industry is highly volatile. We have severe peaks and troughs in revenue. Trying to forecast cashflow with a clunky spreadsheet was a problem. Bates Weston suggested integrated cashflow forecasting, and our cashflow became far easier to manage.

We embrace technology, realising the time it can save us as a business. But we also get peace of mind, knowing our exact financial position and that Bates Weston are seeing it too. We talk regularly, and if an anomaly is spotted, they can fix it straight away."





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EXPERTISE

STUART HULLAND AND KAY BROOKES, BOTH PARTNERS AT BATES WESTON, SPEARHEAD OUR BW INSIGHT BUSINESS ADVISORY SERVICE.

Stuart Hulland, one of Bates Weston's online accounting specialists, sees the benefits of keeping business records online for his clients and for the firm.

"The client saves time in administering their business, and we as their advisors, can oversee their records in real time, helping them to get it right first time, and giving day to day advice on cash flow, credit control, cost control, profitability, VAT and their tax position".

Kay Brookes, specialises in taking care of owner managed businesses and is also a keen advocate of digital record keeping. She knows the difference early action can bring to a business, particularly in managing cashflow.

"To manage cashflow effectively, it is important to have a robust cashflow forecast, based on real time data, that is regularly updated".

The power of digital records lies in real time analysis. BW Insight combines your real time data with our insight, to give you firm financial control and the tools to improve your business performance.

Bates Weston is a fully accredited Xero Platinum Partner. Reflecting our clients' broad choice of accounting software, our accounting teams are familiar with market leading accounting software from QuickBooks, Sage and Intuit and have the flexibility to adapt to bespoke accounting systems.

Talk to Stuart or Kay today about making the most of digital record keeping to benefit your business.

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