



**WORKING  
WITH YOU**  
TO SHAPE  
YOUR FUTURE

# What makes us different?

A presentation to the Healthcare sector

# Traditional Values

- Established in 1935, with a focus on client value for money.
- Extensive experience helping our mainly owner managed clients through a personal, plain speaking approach.
- Quick responses to all your enquiries with 2 experienced, dedicated contacts for every client.
- Easily accessible service, reducing unnecessary cost.
- Continuity of our staff is important to our clients, our good people (and clients) rarely leave.
- Many extra areas beyond producing annual accounts and tax returns that we can help you with.

# Progressive Thought

- Forward thinking interested in your strategic plans – not just the statutory tax compliance issues.
- Get to know your key financial issues and concerns so we can provide help and support at the right time.
- ‘Free unlimited telephone and email support for all routine enquiries’ as we want to talk to you.
- On-going discussions and pro-active advice around areas that are important to you.
- FB Digital, our fully supported cloud based accounting solution around Xero and Quickbooks, see [www.fb-digital.co.uk](http://www.fb-digital.co.uk)

# BIG FIRM CAPABILITY

delivered with local knowledge and personal involvement

Forrester Boyd is the largest independent chartered accountancy practice based wholly within the Humber region and Northern Lincolnshire.

In 2016, the firm achieved national recognition by winning the prestigious Practice Excellence award for Large Practice of the Year and in 2017 was shortlisted for Team of the Year award.



# Forrester Boyd Expertise in the Healthcare Sector

For more info see <http://www.forrester-boyd.co.uk/specialism/health-care/>

Paul has been with the firm since 2006, being appointed a Partner in 2016. Paul advises his portfolio of mainly owner-manager business clients on various accounting, taxation and financial matters.

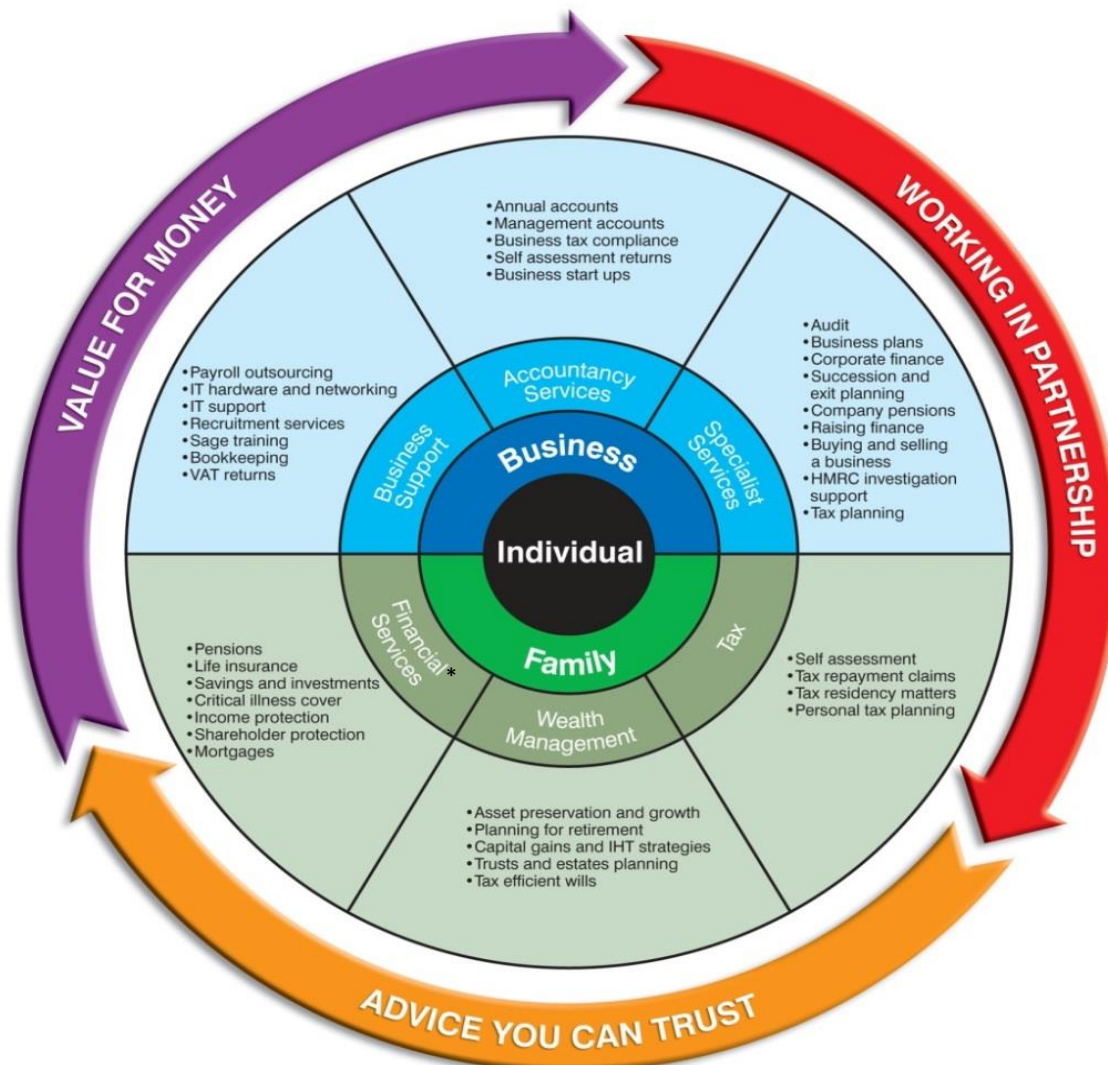
Paul has a portfolio of wide range of clients who operate in professional healthcare and so is familiar with their requirement for specialised advice in this challenging sector. He is supported by a team of staff and works closely with GP's, Dentists and their practice managers to provide a complete service for their financial and tax planning needs.

Most recently Paul has been appointed to head up cloud accounting for the firm and oversees the conversion of new and existing clients to more efficient and integrated online accounting systems.



Paul Tofton  
Partner

# The Complete package for you - and your business



One of the benefits of being a larger practice is not only our depth of technical expertise, but also the breadth of services we can provide.

We have built our business so we can provide all the services you and your business may need.

We know that specialists are needed, especially in areas such as corporate finance, wealth management, tax and payroll, but you don't need to leave the Forrester Boyd family to access these services as and when you need them.

*At Forrester Boyd we don't just offer accountancy services, we can advise on all aspects of your business and individual finances*

\*The Financial Services element of such activities will be carried out by FB Wealth Management Limited.

FB Wealth Management Limited is authorised and regulated by the Financial Conduct Authority. The Financial Conduct Authority does not regulate advice on trusts, taxation or Will writing services.

# Forrester Boyd – client profile

- Dedicated service to the medical sector which means we understand how finances operate in your sector.
- Individuals, small to large GP practices, dental surgeries and associates.
- Regular advice on exit and retirement planning, valuations and structuring deals as well as for those wanting to buy into a practice
- Expertise around Doctors and Dentists pensions\* and tax.
- Access to our extensive financial services business, FB Wealth Management Ltd- [www.fbwealth.co.uk](http://www.fbwealth.co.uk)
- Can assist with bookkeeping and software issues.

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# Forrester Boyd – strong in tax

- In house team to support your accountant.
- Offer client options such as forming a limited company, where appropriate, to save tax.
- Complete tax planning service.
- Advising on the business and personal side.
- Value added tax expertise.
- Bespoke Tax Investigation Protection via our ex-HMRC Inspector.
- Proactive when legislative change occurs.
- Continually seeking to save tax.

*You can trust us to provide the specialist expertise when you need it most*

# Don't just take our word for it-

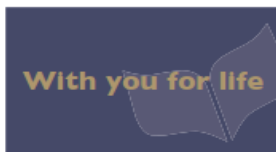
- Please feel free to contact any of the following existing clients for a reference on our service:-
- Debbie Wood, Practice Manager,
  - Scartho Medical Centre 01472 279500
- Nicola Rae, Practice Manager
  - Barton Dental Centre 01652 633580

# FB Wealth Management Ltd



- Wealth Management
- Asset preservation and growth
- Retirement planning
- Trusts and estates planning
- Pensions

Office located in:  
Grimsby  
Louth  
Scunthorpe  
Beverley  
Skegness  
Tel: 0333 11 222 11



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FB Wealth Management Limited is authorised and regulated by the Financial Conduct Authority.



[www.fbwealth.co.uk](http://www.fbwealth.co.uk)  
[info@fbwealth.co.uk](mailto:info@fbwealth.co.uk)

## In house expertise from our Financial Services business- FB Wealth Management Limited

FB Wealth Management Limited has a wealth of experience in the areas of financial planning and wealth management, and provides clients with a comprehensive service designed to create a bespoke financial planning strategy.

FB Wealth Management Limited offers advice to clients on a whole range of financial services including the following:

- Investment strategies
- Pension planning
- Tax planning strategies
- Life and health insurance
- Estate planning

FB Wealth Management Limited is authorized and regulated by The Financial Conduct Authority. The Financial Conduct Authority does not regulate advice on Trusts, Taxation or Will writing services

# Summary of what we offer

- Very supportive and helpful staff available to help you throughout the year.
- Certainty of cost with many extras included.
- Wide range of relevant services beyond tax compliance.
- Pro-active, client service focus.
- Strong in tax efficiency for the business and owners personally.
- Very highly regarded by existing clients

# And finally about us

Forrester Boyd is a partnership in every sense. Formed in 1935 with the merger of two North Lincolnshire partnerships, our 9 Partners and 160 employees are proud to live by the same values and high standards of service today. It's simple really. Our entire ethos is based on providing the support that clients want and need; delivered by down-to-earth people that work hard, look beyond the obvious and deliver on time and to budget.

Over the years we've expanded our range with established new services that add value to our local and national client base and mirror our culture.

In 2013, we expanded further into East Yorkshire, acquiring a well-established Beverley-based accountancy firm. Trading as a separate legal entity, Forrester Boyd Robson Ltd provides clients with the full range of accounting, tax and financial services.

Forrester Boyd is a participant of Praxity - the largest accounting alliance globally and is amongst the top 10 global Accounting Associations. [www.praxity.com](http://www.praxity.com)



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Forrester Boyd is a partnership operated from the offices listed above.



[www.forrester-boyd.co.uk](http://www.forrester-boyd.co.uk)  
[www.fb-digital.co.uk](http://www.fb-digital.co.uk)

For up to date accountancy,  
tax data and much more  
download our **FREE APP**

Forrester Boyd Robson is a trading name of Forrester Boyd Robson Limited, a company incorporated in England & Wales with company number 08370127 and registered office at Kingfisher Court, Plaxton Bridge Road, Woodmansey, Beverley, HU17 0RT