



**WORKING  
WITH YOU**

TO SHAPE  
YOUR FUTURE

# What makes us different?

A presentation to the Agriculture Sector

Thank you for your time at our meeting, we hope our approach may fit with what you need right now from your most trusted advisers.

Here is a short summary of what we covered and how we approach our client service.

We look forward to speaking with you again soon about how we could take this forward.

In the meantime, if you wish to contact us our details are as follows:-

01472 350601

[marketing@forrester-boyd.co.uk](mailto:marketing@forrester-boyd.co.uk)

Offices at:-

Grimsby, Louth, Scunthorpe, Skegness & Beverley

# Traditional Values

- Established in 1935 with a focus on client value for money.
- Large farming department staffed by colleagues who understand the sector and provide a personal, plain speaking, efficient and practical approach.
- 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.

*"I am very happy with the service that Forrester Boyd provides to me, which is always prompt, professional and efficient. Our partner there takes care of my accounting and tax matters leaving me to take care of my business."*

*Hallington Farming Company Ltd*

# Progressive Thought

- Forward thinking – interested in talking through your strategic plans, not just the ‘here and now’ issues.
- Get to know your key financial issues and any concerns so we can provide help and call upon our experience to provide support to you, at the right time.
- No annoying ancillary charges for the main service - includes unlimited telephone and email support for all routine enquiries.
- Regular discussions and pro-active advice around areas of change that are relevant to you within the sector.
- Help you meet the requirements of HMRC’s Making Tax Digital with the option of our fully supported cloud based accounting solution see [www.fb-digital.co.uk](http://www.fb-digital.co.uk)

“Forrester Boyd have been accountants to this firm and to countless Lincolnshire farmers for decades. This speaks for itself as a first class recommendation.”

*David Williams, Masons  
Chartered Surveyors, Louth*

# 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 the Team of the Year award.



# We offer a partner led service for our Agri-sector clients

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



Lee Bradbury

Lee became a partner in April 2013. Now based at the Louth office, he heads up the agricultural specialist team.

Lee advises a broad portfolio of predominantly agricultural clients, coming from a farming family in Lincolnshire, Lee has a good understanding of the family and business issues that frequently arise. He also recognises the potential changes required in the current agricultural climate and has been able to assist clients with the restructuring of their businesses to improve profitability and tax efficiency.



David Everatt

David has been with Forrester Boyd since 1988 and specialises in owner managed businesses. He has a broad portfolio in terms of types of business, but has developed expertise in farming and in particular larger family estates where his knowledge and experience in tax has been invaluable to clients.

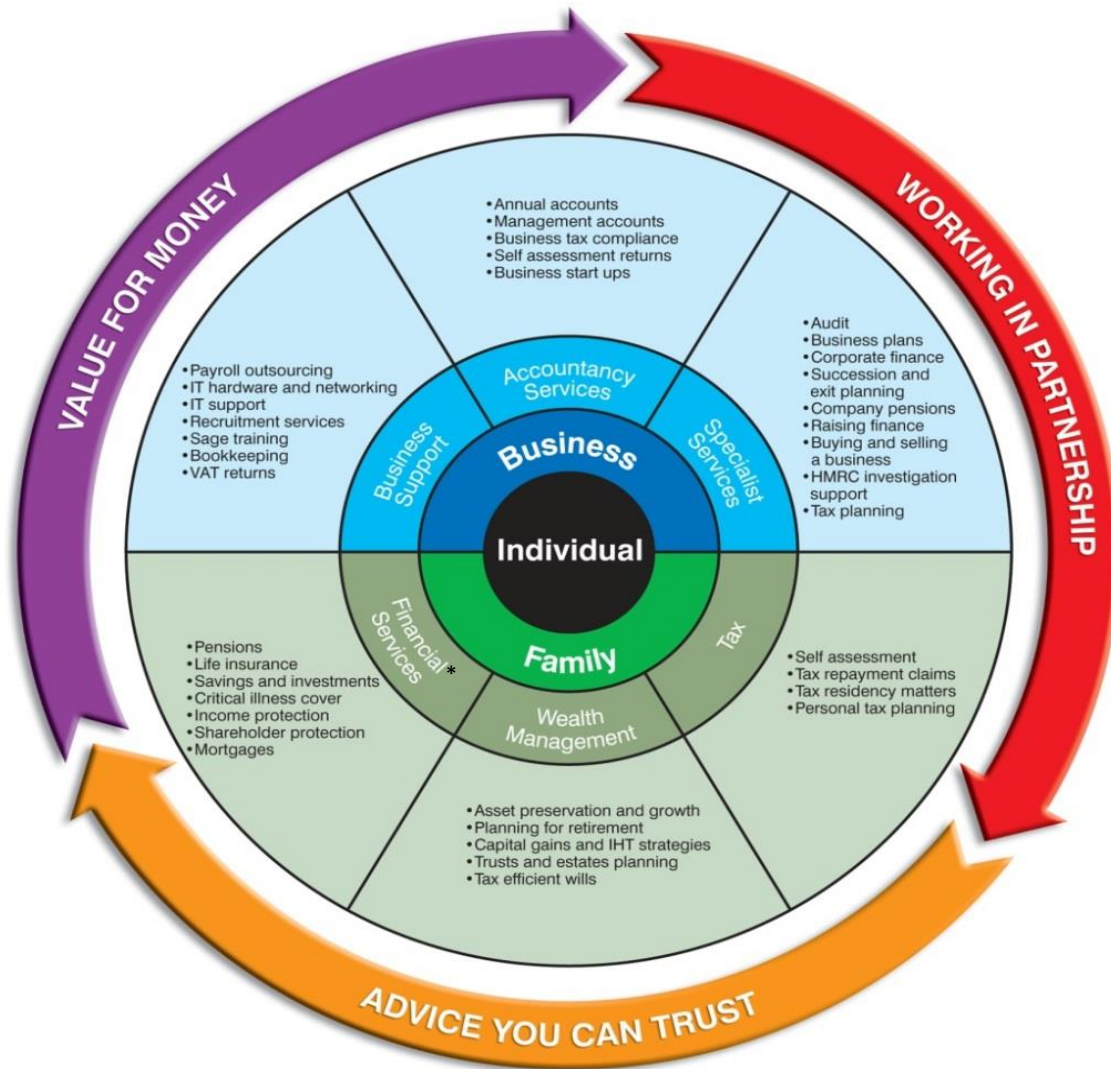
In today's challenging times David's wealth of expertise is invaluable as is his approach of building strong and proactive relationships with his clients to help solve their business issues.

*“Forrester Boyd have been instrumental in helping me grow my business. Their team are very professional, giving sharp, sound, solid advice whilst maintaining a friendly uncomplicated approach.”*

**County Turf Ltd**



# Our Advisory Service- A 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.

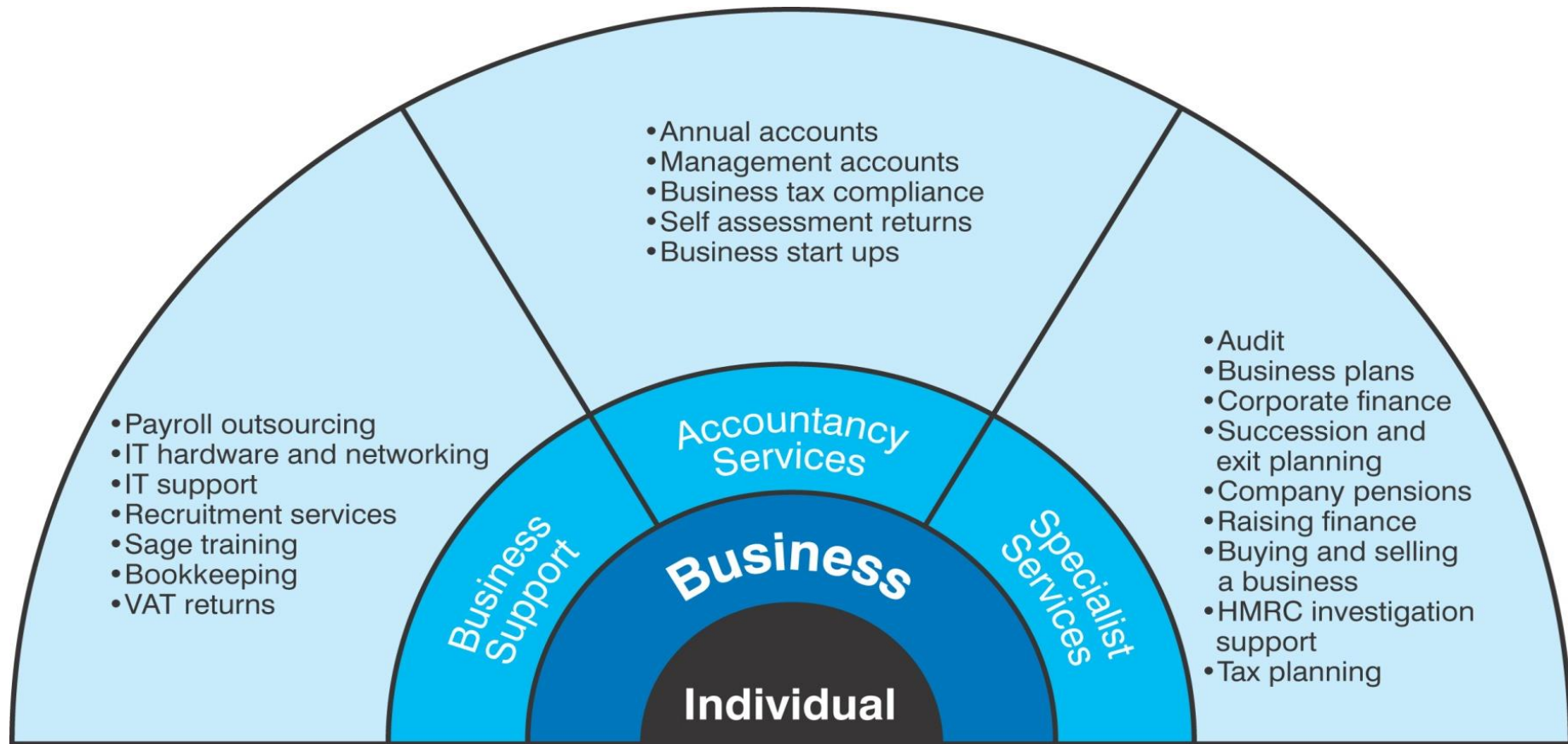
We know that specialists are needed, especially in areas such as corporate finance, wealth management, tax and payroll, but you don't need to leave the Forrester Boyd family to access these services as and when you need them.

*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.



# Lets look at the business side of things first



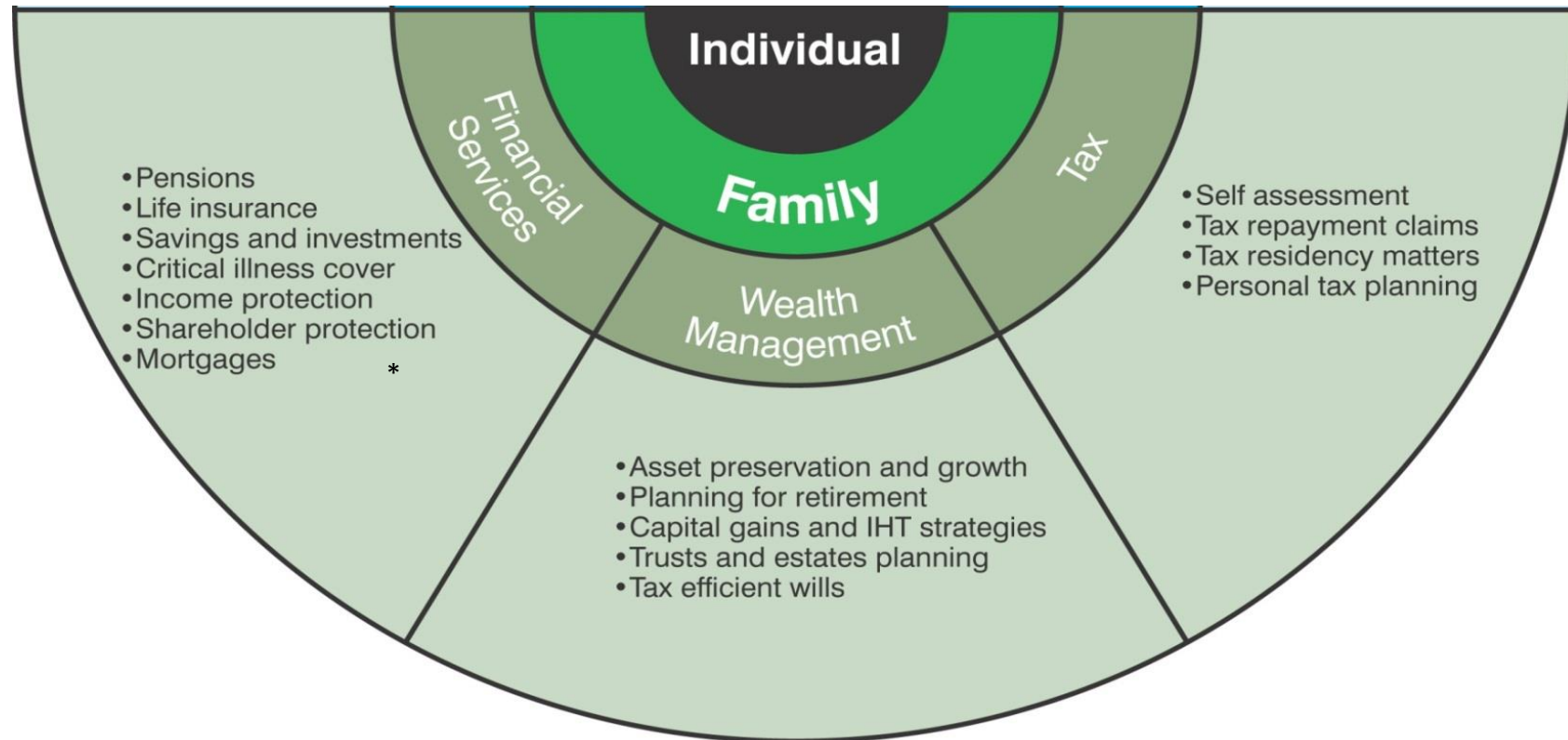
# Forrester Boyd – client profile

- Client base generally within 90 minutes of our office to ensure an efficient but personal service.
- Over 300 clients with farms and businesses in the agri-sector covering almost every enterprise and mix.
- Ranges from individuals and family farms to larger estates, contracting businesses and machinery dealers.
- Each of our dedicated specialist partners have their own teams who also understand your sector.

“Forrester Boyd provides us with an efficient, personal, service by giving sound advice. He always responds promptly to requests to meet or discuss matters on the phone”

*D Haxby Farms Ltd*

# And also the needs of key stakeholders in the business



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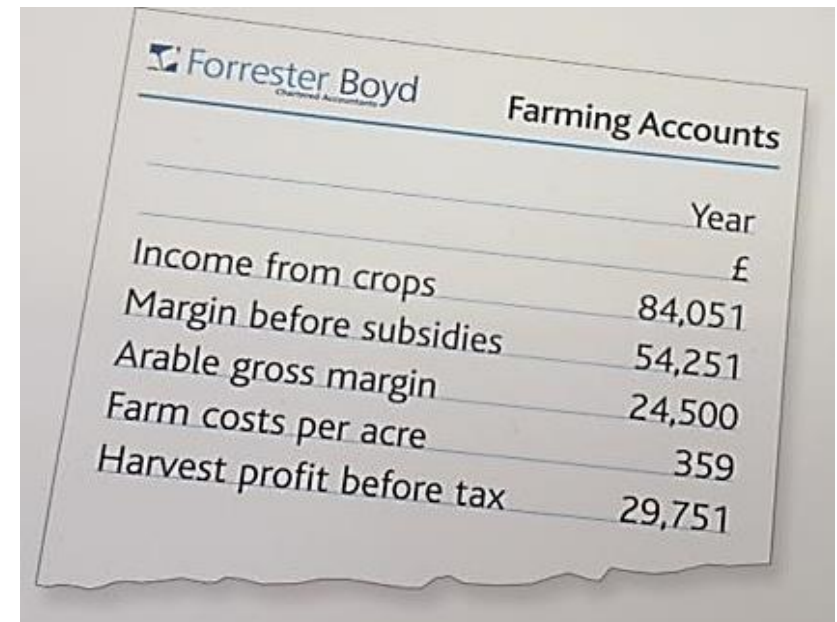
# With a focus on tax efficiency

- Income and Capital taxes covered by tax specialists.
- Advising owners, directors and shareholders.
- Inheritance tax and agricultural property relief expertise.
- Annual investment allowance.
- Very comprehensive Tax investigation cover available.
- Proactive when legislative change occurs.
- Continually seeking to save tax.

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

# Extensive accounting information

- Bespoke farming accounts produced.
- Includes 5 year comparisons by harvest.
- Performance and costs per acre/hectare.
- Augments clients existing information.
- No extra charge.
- Only extra info needed is your cropping plan.
- Profitability and performance analysis.



	Year
Income from crops	£ 84,051
Margin before subsidies	54,251
Arable gross margin	24,500
Farm costs per acre	359
Harvest profit before tax	29,751

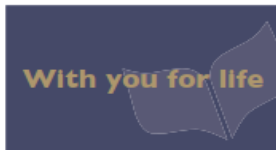
*“Seeing management information by harvest rather than just financial year is a very powerful tool for all farmers”*

# 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



The Financial Conduct Authority does not regulate advice on trusts, taxation or Will writing services.

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
- Dedicated, local specialists in agri-sector.

# 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