

# One Affinia: World Earth Day

affinia

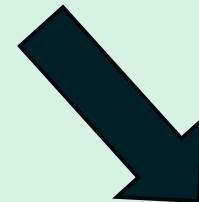
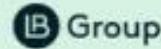


Group Update:  
22 April 2025

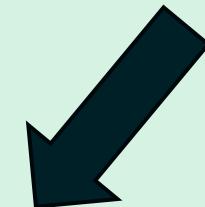
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# One Affinia

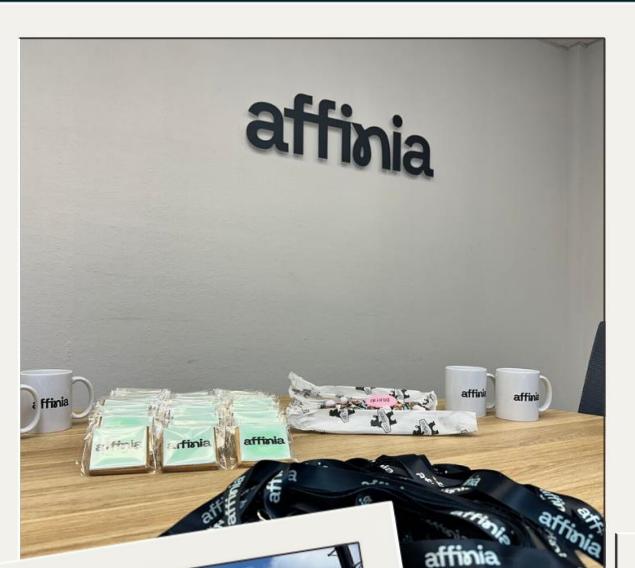


Real people.  
Real growth.  
Real difference.  
Down to earth expertise.  
300 years of history.



# affinia

## Introduction



# Clients | Colleagues | Community

## 1. Strongly differentiated in the marketplace:

- a. We develop colleagues and offer rewarding careers in local offices in the heart of the regional community
- b. We help the regional economy thrive directly supporting local communities alongside committed voluntary action

## 2. Our **purpose-led approach** is helping us:

- a. Win new clients
- b. Recruit new colleagues and retain our talent
- c. Attract like-minded firms to deliver trusted, local advice

## 3. We can be **proud of our firm**, our culture and our RIALTO values:

- a. Respect, Integrity, Aspire, Learning, Teamwork, Ownership

## Trading



## Talent



## Transactions



## Technology



- Affinia is growing strongly
- Balancing client work and billing with our integration activity is an ongoing challenge
- We are learning all the time

- Cezanne, appraisals, competency frameworks
- Career journeys, exam successes and promotions
- RIALTO Committee

- Firms / offices that have a similar cultural fit and ethos, values and approach to the 3Cs
- Bring new specialist sector capability and/or additional service lines
- Long-established, successful firms in their own right

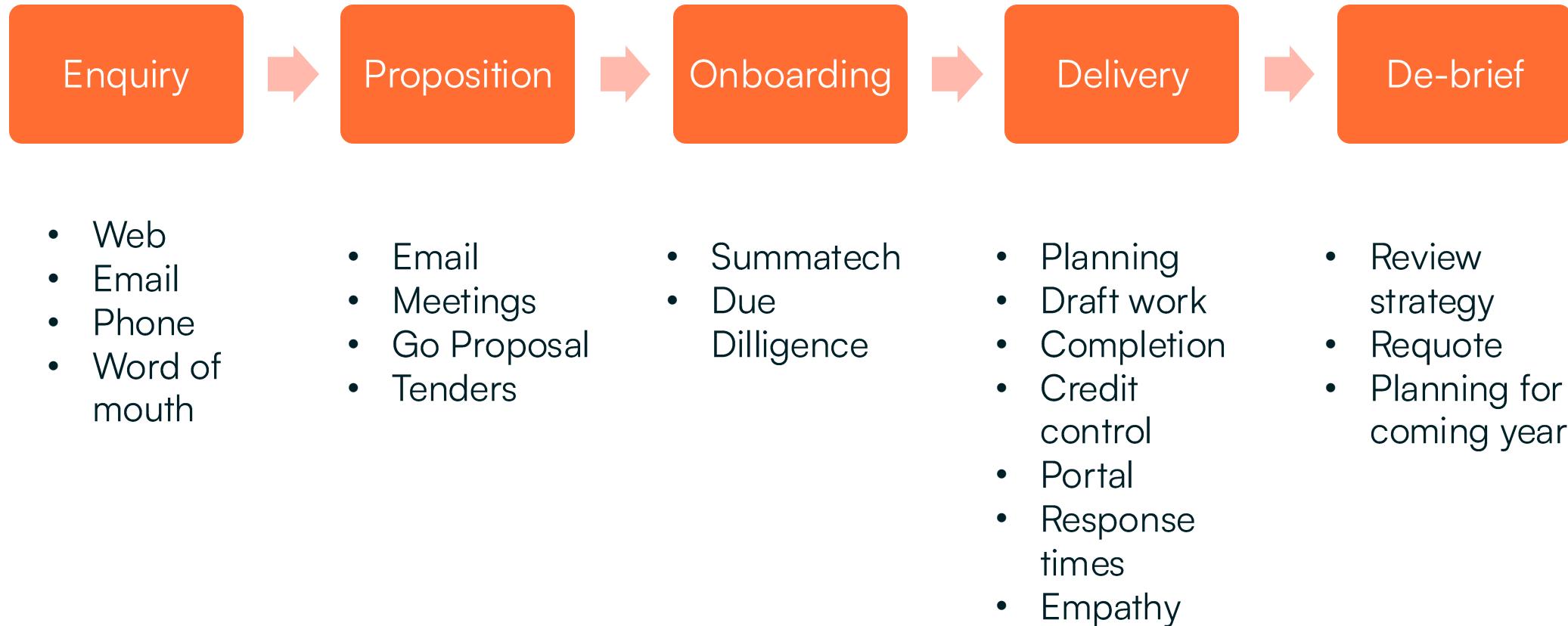
- Established “AIAI” data capability based in Chandigarh, India
- Rob H chairing a steering committee that is turning to key strategic matters (e.g. AI)

# Commercial focus

# Our client journey

An update from our client experience group

“A great team, doing great things for clients – focus on getting this consistently right and the business results look after themselves”



# Our service matrix

# Our service matrix

## Accounts

- Accounts preparation
- MI
- VAT return preparation
- Forecasting
- Company Secretarial
- Cloud Accounting
- Digital Transformation
- FD/FC

## Tax

- Property Tax
- Private Client
- Holistic Advisory
- VAT Advisory
- International Advisory
- R&D
- EMI
- EOTs

## Audit

- Statutory Audits
- Assurance Reviews
- Independent Examinations
- Specialist Audits

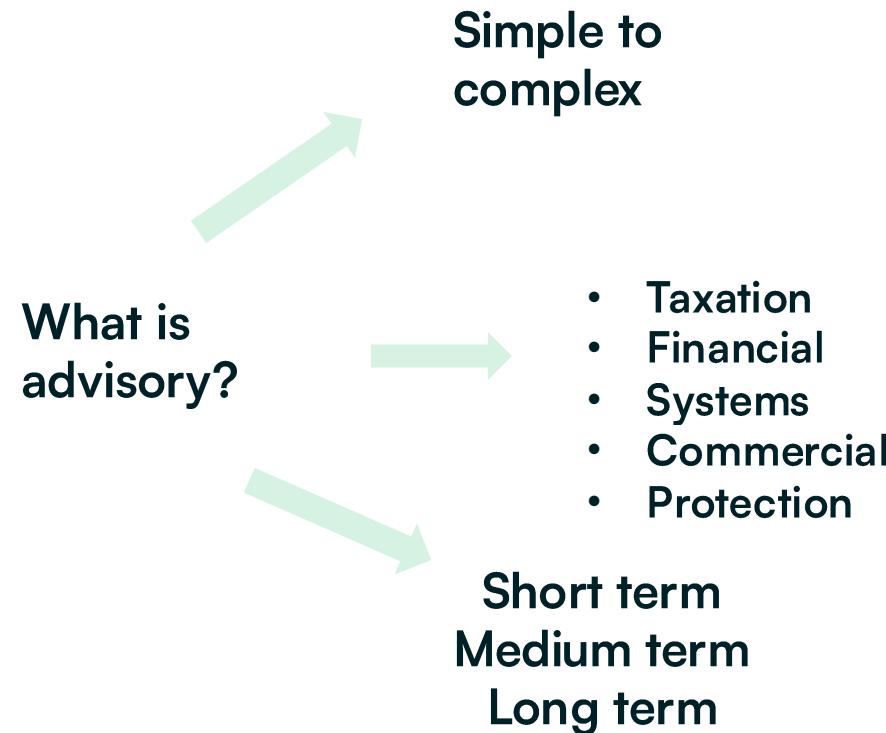
## Corporate Finance

- M&A
- Management buyouts
- EOTs
- Financial DD
- Debt advisory
- Finance Raising
- Strategic planning
- Business forecasting and financial modelling

## Payroll

- Regular Payroll compliance
- Auto Enrolment and Workplace Pension compliance
- CIS Compliance
- Salary Sacrifice advice
- Payroll advisory
- Employee Bens

## "Advisory" - a broad concept...



### The importance of advisory:

- Be the "Trusted Adviser"
- Solving and supporting client issues
- Client journey and relationship building
- Real "Value-add"
- Differentiates us as a firm

# Being "the advisor"

# Awareness and Identification



# Tax Planning Guide



## Private Client Tax

Find out more about reliefs and planning opportunities for your private wealth including:

- Income Tax Planning
- Investments
- Capital Gains Tax Planning
- Inheritance Tax Planning
- Residency and Domicile

[Read more](#)



## Business Owners

As a business owner, it is important to consider the reliefs and planning opportunities such as:

- Profit Extraction
- Maximise Capital Allowances
- Double Cab Pick ups
- Business Asset Disposal Relief (BADR)

[Read more](#)



## Property Tax

Find out about the reliefs and planning opportunities for your property investments, including:

- Company Owned Residential Property
- Stamp Duty Land Tax
- Property Capital Allowances
- Property VAT Planning
- Property Incorporations and Portfolio Restructuring
- Furnished Holiday Lettings (FHLs)

[Read more](#)

# M&A Seminars



Service innovation... "let's  
help more"

# Sustainability Advisory

**Whilst considering our own position, it is only natural to us that we can help support clients with their sustainability journey.**

- In development with a focused team
- Recently instructed a partner firm to support this offering



# People Update

# Talent update — our culture

CezanneHR

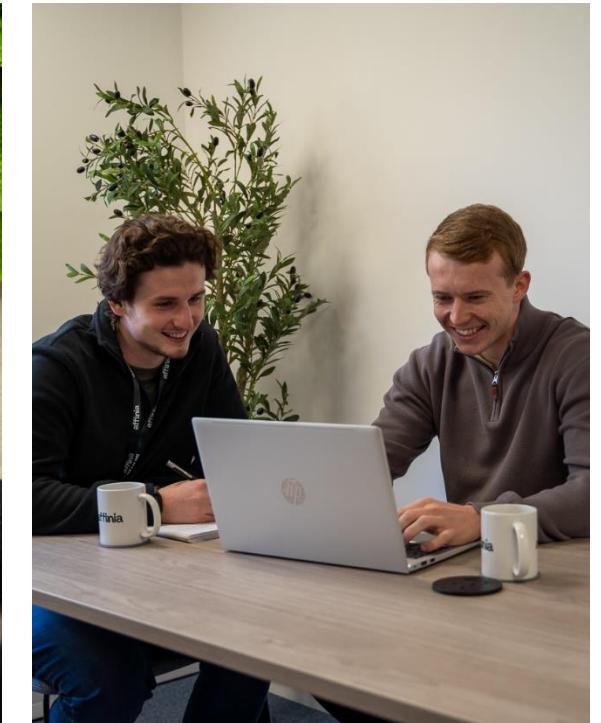
Mid Year Performance  
Appraisals



Core Competency  
Framework



RIALTO Committee  
& DE&I



 **Cezanne HR**

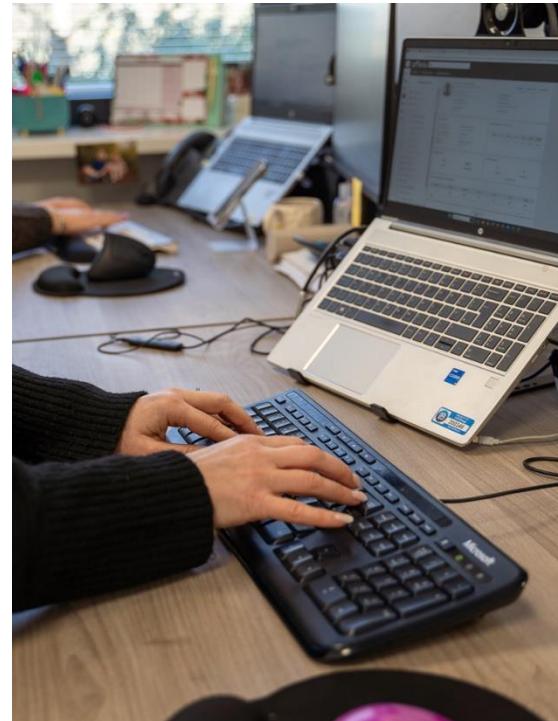
# Talent update — our culture

People & Culture KPIs

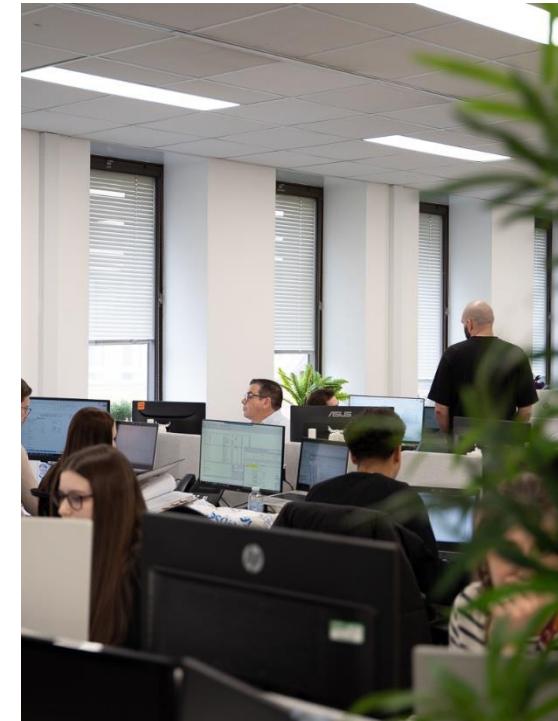


Employee

Engagement Survey



Open House Visits



Exam Successes &  
Promotions



# Congratulations!

## Exam Passes:

**Abbie Bennett** — AAT Level 4  
**Ash Thompson** — AAT Level 4  
**Freddie Scott-Yates** — AAT Level 4  
**Ash Thompson** — Level 4 Synoptic  
**Freddie Scott-Yates** — Level 4 Synoptic  
**Ashton Croft** — Level 4 Synoptic  
**Megan Hunt** — Level 4 Synoptic  
**Jay Mardania** — Personal Tax  
**Mia Dore** — ACCA Financial Management  
**Charlotte Gray** — ACCA Financial Management  
**Andrew Zhou** — ACCA Financial Management  
**Luke Green** — ACCA Financial Reporting  
**Chloe Leatherdale** — ACCA Financial Reporting  
**Emma Dighton** — ACCA Financial Reporting  
**Steffen Summerford** — Financial Reporting & Audit and Assurance  
**Aaron Brooks** — Financial Reporting & Audit and Assurance  
**Gabriella Exley** — Taxation & Performance Management  
**Joshua Jones** — Applied Management Accounting  
**Alfie Mainwaring** — ACA Tax Compliance  
**Josh Wilby** — Management Information Accounting  
**Sam Luscombe** — Management Information Accounting  
**Ben Caleno** — ICAEW Law  
**Ethan Garcia** — Business Tax  
**Luke Green** — Audit and Assurance  
**Gabriella Exley** — Audit and Assurance  
**Marc Tuner** — Tax  
**Aparna Barua** — Advanced Tax

## Promotions:

**Chris Annis** — Chief Commercial Officer  
**Stuart Sheldrick** — Head of Accounts: Central region  
**Mark Philpott** — Head of Accounts: North region  
**Andrew Meredith** — Head of Accounts: South region  
**Andrew Runicles** — Audit Director  
**Oli White** — Audit Director  
**Emma Bartlett** — Audit Associate Director  
**Gemma Chan** — Education Associate Director  
**Ben Turnbull** — Accounts Associate Director  
**Ashley Stoller** — Private Client Senior Manager  
**Robert Tovey** — Accounts Senior Manager  
**Anna Godbold** — Accounts Senior Manager  
**Piers Otton** — Tax Senior Manager  
**Emma Dighton** — Manager  
**Mikki-Marie Durrell** — Audit Manager  
**Olly Sharman** — Accounts Manager  
**George Symonds** — Accounts Manager  
**Thomas Aitchison** — Tax Manager  
**Holly Heslop** — Private Client Manager  
**Elena Canning** — Tax Assistant Manager  
**Dillon Harris** — Semi Senior Accountant  
**Akif Upton** — Semi Senior Accountant  
**Thomas Lilley** — Tax Senior  
**Marnie Cavill** — Senior Business Support  
**Sara Stevenson** — Senior Business Support

## Completed qualifications:

**Abbie Bennett** — AAT  
**Ashton Croft** — AAT  
**Joshua Jones** — AAT  
**Fern Webb** — AAT  
**Ruby Smith** — AAT  
**Freddie Scott-Yates** — AAT  
**Ash Thompson** — AAT  
**Kate Scarry** — ACCA  
**Elena Mihaila** — ACCA

# Community

# Community & Fundraising

## Emmaus

Colchester Easter Egg donation



## Red Nose Day

Bake Sale



## Bromley Borough

### Foodbank

Baxter & Co foodbank donation



### Certificate of Thanks

This Certificate is presented to all those who have donated to Bromley Borough Foodbank:	<b>Baxter &amp; Co</b>
Date of donations:	<b>7 February 2025</b>
Total donations given to help support the work of Bromley Borough Foodbank:	<b>224.50kg</b>

*With our Grateful  
Thanks*

# Fundraising

## Marathon Fundraisers

Tommy's: Fiona O'Connell

Cancer Research: Gabriella Exley



## Suffolk Mind

Olly Sharman



## NHS Donation

Sidcup



The background features large, abstract, semi-transparent shapes. In the top left corner, there is a large white shape resembling a stylized '8' or infinity symbol. In the bottom right corner, there is a large orange shape resembling a stylized '8' or infinity symbol.

affinia

Thank you.

[www.affinia.co.uk](http://www.affinia.co.uk)