

# One Affinia: World Earth Day

affinia

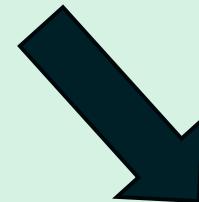
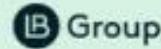


Group Update:  
22 April 2025

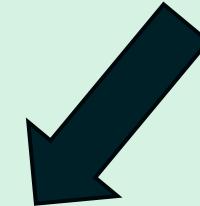
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# One Affinia

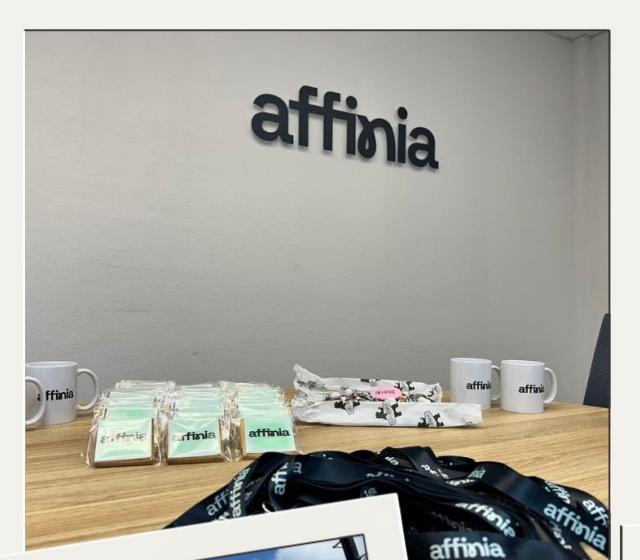


Real people.  
Real growth.  
Real difference.  
Down to earth expertise.  
300 years of history.



# 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

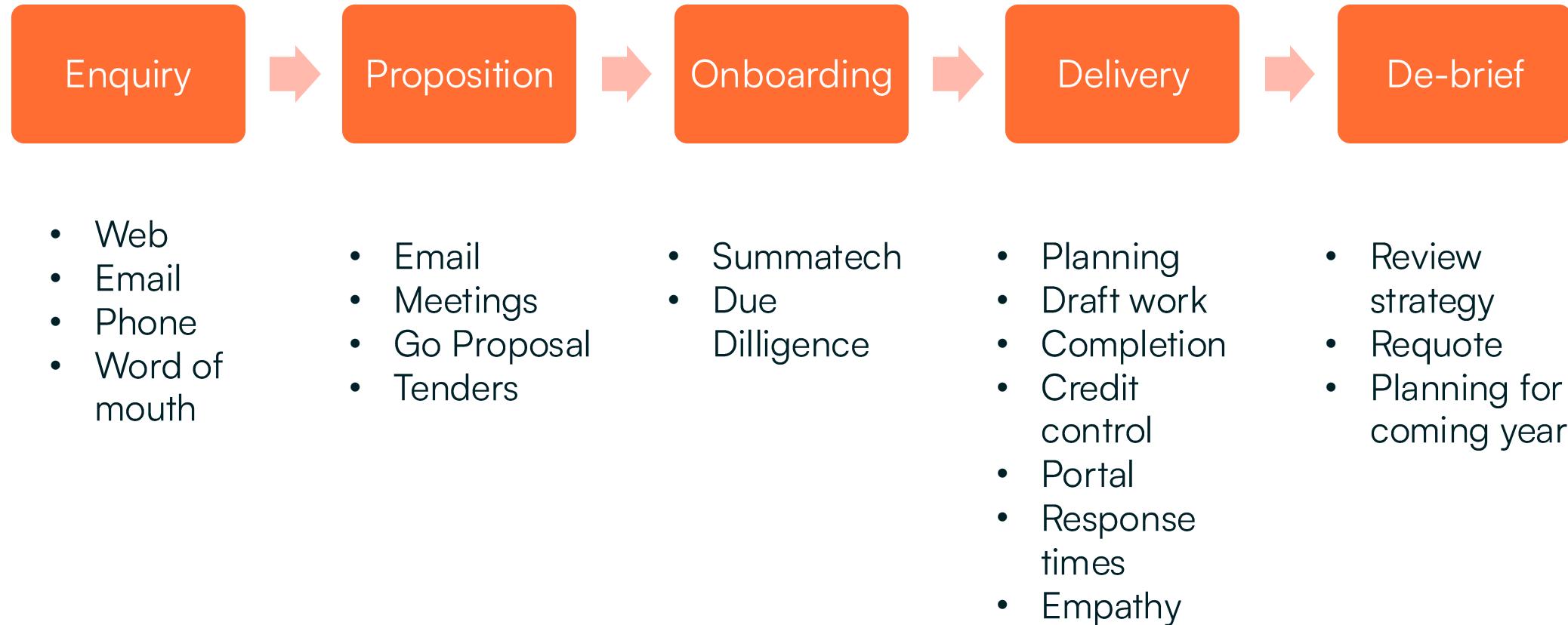
- Established “AIAI” data capability based in Chandigarh, India
- Rob H chairing a steering committee that is turning to key strategic matters (e.g. AI)

# 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

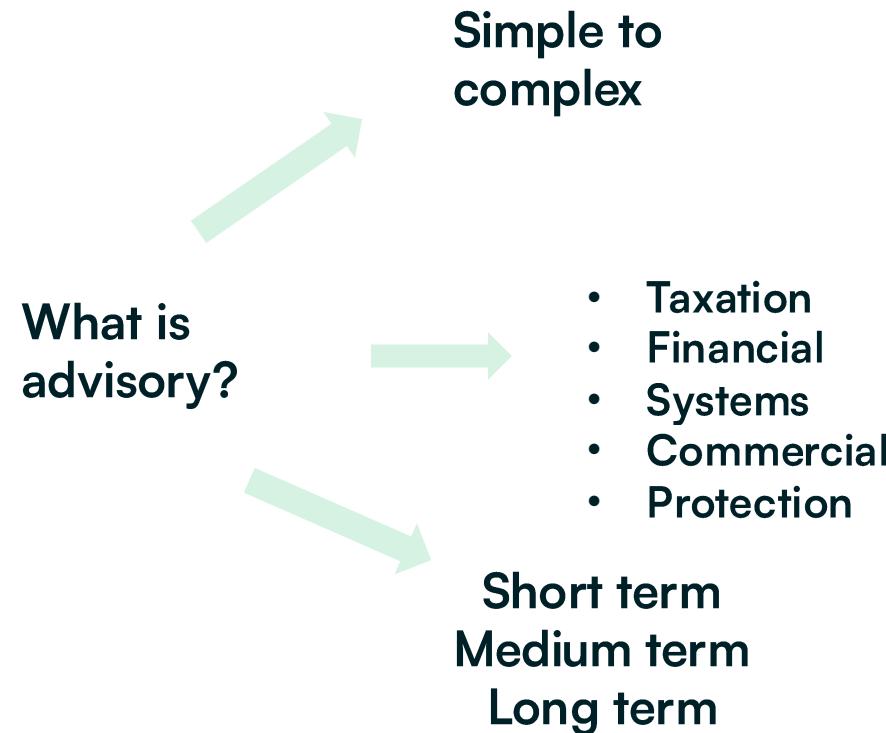
## Corporate Finance

- 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

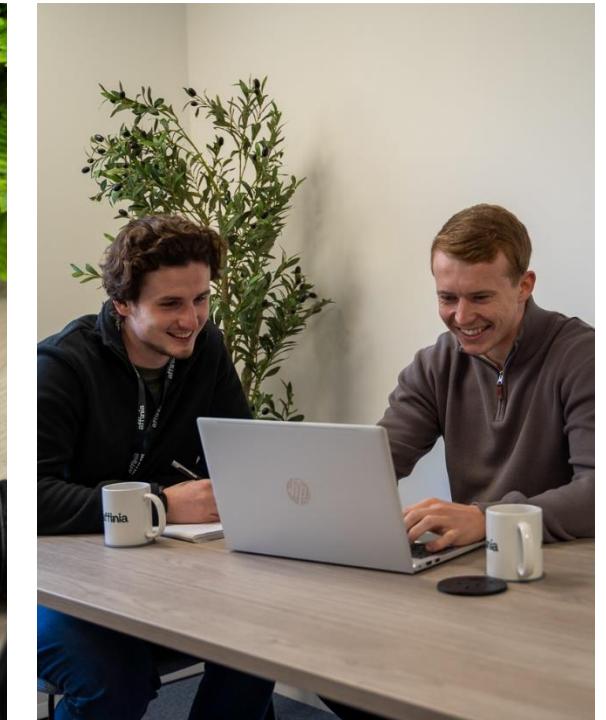
Mid Year Performance  
Appraisals



Core Competency  
Framework



RIALTO Committee  
& DE&I



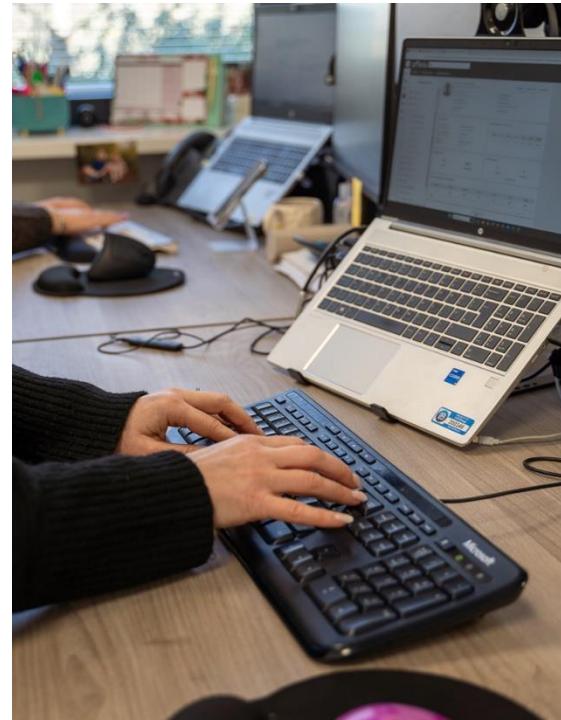
# Talent update — our culture

People & Culture KPIs

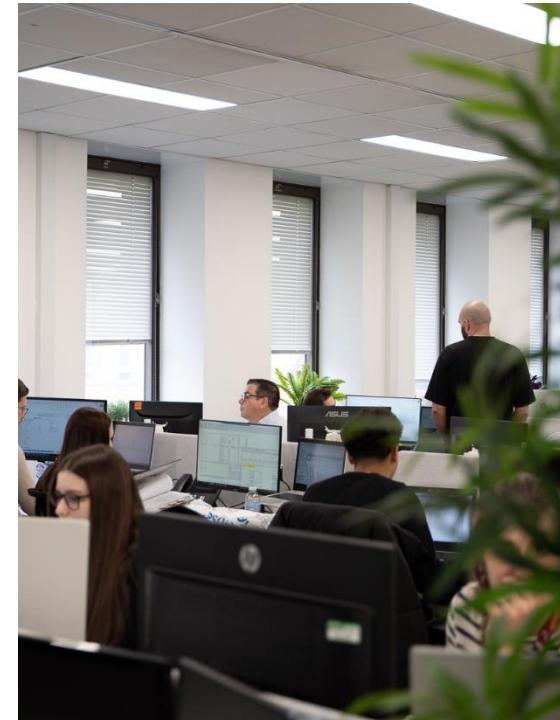


Employee

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, overlapping shapes in white and orange. The white shapes are on the left, with one prominent shape resembling a stylized '8' or infinity symbol. The orange shapes are on the right, with one large, thick, circular shape and another smaller, more complex shape below it, both resembling stylized '8' or infinity symbols.

affinia

Thank you.

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