

THE PULSE CLIENT JOURNEY

Our 5 Stage Success Journey

With you from inception through to retirement

A proven process that takes your business from simply compliant to genuinely thriving.

01 Compliance & Foundations

Get your numbers right

02 Tech Advisory

Make your business run smoother

03 Business Advisory

Make your business perform better

04 Tax Advisory

Minimise tax on your success

05 Exit Planning

Build your business to sell

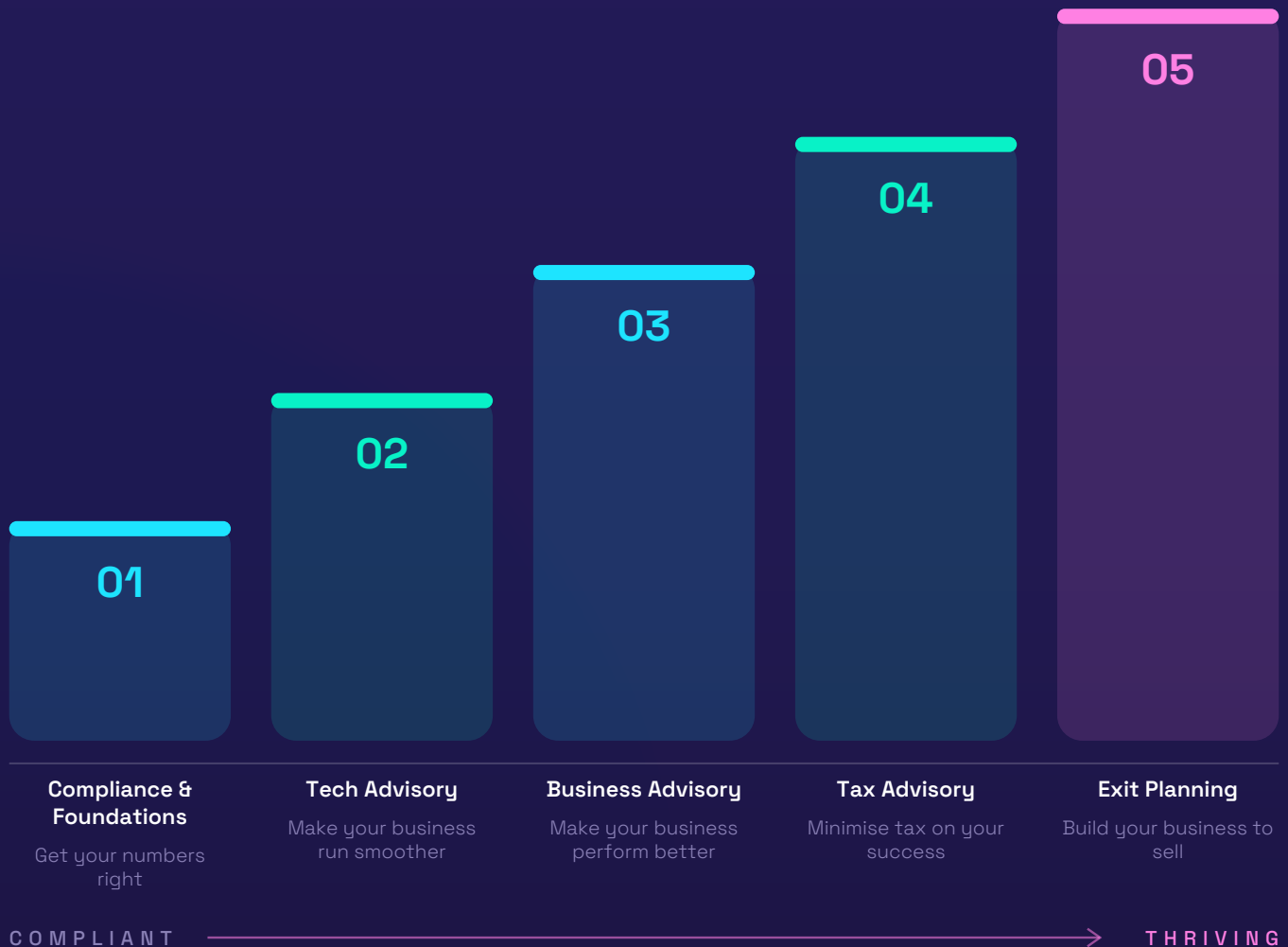
Newton Aycliffe | Newcastle | London

01325 522123



Compliant to thriving, one stage at a time

Every stage builds on the one below it. Get the foundations right and the technology working, and everything above becomes far easier to deliver.



GOOD TO KNOW

You do not have to start at Stage 1

Most businesses join us part way up. We work out where you sit today, close any gaps underneath you, then move you forward at a pace that suits the business rather than the calendar.

Stages one to three

01

STAGE 01

Compliance & Foundations

Get your numbers right

We keep your business compliant and your financial records accurate and up to date, so nothing lands on you at the last minute.

- ✓ Accounts preparation and filing
- ✓ Tax returns submitted on time
- ✓ Peace of mind on regulations
- ✓ Bookkeeping systems in place
- ✓ HMRC compliance assured

02

STAGE 02

Tech Advisory

Make your business run smoother

We use technology to automate the routine work, improve efficiency and give you back the hours you currently spend on admin.

- ✓ Cloud accounting optimisation
- ✓ Automated workflows and integrations
- ✓ Connected apps ecosystem
- ✓ Real time financial dashboards
- ✓ Receipt and expense automation

03

STAGE 03

Business Advisory

Make your business perform better

Strategic guidance to grow revenue, improve margins and build a business that is genuinely worth more than it was last year.

- ✓ KPI tracking and accountability
- ✓ Cash flow forecasting
- ✓ Regular advisory meetings
- ✓ Pricing and margin optimisation
- ✓ Growth strategy planning

Stages four and five

04

STAGE 04

Tax Advisory

Minimise tax on your success

Now the business is performing, we make sure you keep more of what you have earned through planning done in advance rather than in hindsight.

- ✓ Tax efficient extraction strategies
- ✓ R&D and other tax reliefs
- ✓ Wealth preservation strategies
- ✓ Capital allowances optimisation
- ✓ Succession and exit planning

05

STAGE 05

Exit Planning

Build your business to sell

Whether you plan to sell, pass the business on or simply step back, we prepare it for a successful exit on your terms and your timescale.

- ✓ Exit readiness assessment
- ✓ Business valuation optimisation
- ✓ Deal structure and tax planning
- ✓ Owner dependency reduction
- ✓ Succession planning strategies

NEXT STEP

Where does your business sit today?

A conversation with your accountant is the quickest way to find out. It is worth looking at where you sit today, what is missing underneath you and what the next stage realistically looks like for your business.

01325 522123

pulse-accountants.co.uk