

PRACTICAL FINANCIAL SUPPORT

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An overview for accountants, solicitors and CFOs



Working alongside you

I'm a Fellow Chartered Certified Accountant who built, grew and sold my own business. I work alongside a client's accountant, solicitor and tax adviser, never around them. My role is to help your client understand what's in front of them and reach sound decisions, which usually makes your work easier, not harder. Everything is handled with discretion.

When to think of me

FOR BUSINESSES

Your finance function

A business that needs an internal finance department set up, or an independent review of its existing finance or bookkeeping structure, with clear recommendations.

Directors' meetings

New and growing businesses introducing formal directors' meetings for the first time. Support covers establishing a structured monthly meeting, defining the information each director requires and who is responsible for providing it, and refining how it is prepared and presented, stepping back once the process is embedded.

FOR INDIVIDUALS AND FAMILIES

When a business is left in a client's hands

A widow or widower now responsible for a business they had little involvement in, facing decisions they don't yet feel equipped to make.

A trusted point of contact

A client with more involved affairs, such as property, investments or adult children, who would benefit from one organised person coordinating everyone and preparing the fuller picture ahead of the tax return.

What happens after an introduction

I have an initial conversation with your client, free and without obligation. With their permission, I keep you informed and bring information to you prepared and organised. You remain the client's adviser throughout.

"She not only implemented the new system and processes but also coached and trained one of our team members into their new role, giving us the confidence and capability to run our finances independently going forward."

AC · CEO of a Charity

Let's talk Email sarah@sarahdaly.com Phone **087 995 9521** Web www.sarahdaly.com

I work alongside your client's regulated advisers. I do not provide investment, legal or regulated financial advice, and I do not replace the client's accountant, tax adviser or solicitor.