

# Godalming Breakfast club Shipleys' people



**Jane Henman**

**Jane** is a true general practitioner who uses her wealth of knowledge and experience to work on audit, accounts, business planning, management, business and personal tax, to help clients achieve their objectives.

Qualified in the charity sector, Jane heads our trust department, where her focus is on IHT planning, tax, accounts and estate duty compliance for UK and non-UK individuals and trustees.



**Oliver Heslop**

**Oliver** is our expatriate tax specialist. His clients range from senior executives appointed to positions abroad who require tax planning, to large multinationals with secondees in 30 or more countries.

Companies and secondees are often surprised by the complexities and red tape associated with a secondment. Oliver has "warts and all" experience as he spent six months on secondment in Poland.



**Mike Luckett**

**Mike** is responsible for the day-to-day running of Shipleys' tax departments in all our offices.

His expertise covers work for private clients and trusts & estates. Mike's key focus includes expatriates and non-UK domiciliaries, more complicated UK tax planning and HM Revenue & Customs tax investigations. As a former taxman he is well aware of the procedure from the other side of the fence.



**Simon Robinson**

**Simon's** focus is on hand-holding, nurturing individuals and their businesses, guiding them through red tape and managing expansion. He brings accounting expertise and a wealth of tax experience to advise on a wide range of issues.

He has clients in sectors such as entertainment, media, IT, the professions, and not for profit organisations as well as owner managed business, and private individuals.



**Steve Foster**

**Steve's** clients range from ambitious start ups to public companies. His audit and corporate finance experience includes sectors such as property, automotive, IT and media.

As well as attending to statutory compliance matters, Steve has considerable experience in business planning and strategy to help businesses achieve their objectives. He also writes regularly for professional publications.



**Stuart Dey** is our Business Development Director. He has more than 20 years tax experience with Stoy Hayward, Ernst & Young and Shipleys. Nowadays he divides his time between helping clients pay less tax without breaking the law, and ensuring our business development and marketing activities are focused and effective.



**Martin Frost** is a tax manager, providing compliance and planning services to a diverse range of private clients, including (in conjunction with other professionals) broader wealth management. He also works on local business development.



**Kathy Morton** is an audit and accounts supervisor with a BSc (Hons) in Maths and the ACCA qualification. She plans, runs and completes audits and looks after corporation tax returns, VAT returns and payrolls. Kathy prepares financial statements for companies, sole-traders, partnerships and charities of varying sizes.



**Carol Stevens** has been a Chartered Accountant for a long time, as a fee earner working with families to preserve their wealth and, at the same time, running the administration of Shipleys.



**Cat Seddon** joined Shipleys in 2008 as a Senior Manager to head up the audit department at the Godalming office. In addition to audit, Cat advises a wide range of businesses with a particular bias towards the owner-managed sector as this is where she feels that she can add the most value.



**Wei-Yin Taylor** is a manager in the audit and accounts department in Godalming. She works closely with her clients to provide services that extend beyond the provision of pure audit, accountancy, tax and tax related services. Wei-Yin is FCCA qualified.



**Jane Whalley** started at Shipleys in 2003, is our HR expert and is studying towards her post-graduate HR management qualification. She assists in the business development of the Godalming office, which includes organising the monthly breakfast meetings.

# Godalming Office

Our team at Godalming look after individuals and businesses who require an efficient, cost effective, local service with the benefit of easy access to more specialist advice. Our expertise includes:

## Accounting

We can help set up the system for you to keep financial records that give you useful, accurate management information, and enable cost-effective, on time production of the statutory accounts.

## Audit

We can audit Financial Statements to comply with the Companies Act, Charities Act and requirements of regulatory bodies such as the Financial Services Authority and Law Society. Your constitutional documents, shareholders or third parties such as the bank may require an audit.

## Company Secretarial Services

We can form your new company or limited liability partnership (LLP).

We can help your Company Secretary maintain the statutory records and file documents at Companies House. We can provide a "registered office" for public inspection of the statutory records and service of legal notices.

## Business Taxation

Businesses must submit tax returns to HM Revenue & Customs (HMRC), and our tax specialists can help with all aspects of these. We can help mitigate your tax liability and tell you what to pay and when.

## PAYE

Our payroll bureau helps employers operate a Pay As You Earn (PAYE) scheme under which tax, national insurance contributions and other deductions are made from employees' salaries.

## VAT

We can help you work out whether to register and to comply with the VAT rules

We also help some clients complete their VAT return forms, as penalties and interest can be

incurred if they are not accurate and filed on time.

## Private Clients

We specialise in looking after the financial affairs of individuals, often leading a team of advisers with different expertise so that our clients benefit from co-ordinated advice.

Our tax experts in Godalming offer a first class, personal service covering both compliance and planning. Doing your tax return correctly and on time helps keep you on the right side of the taxman and avoids late filing penalties, interest and surcharges.

We can also help with estate planning and inheritance tax mitigation and compliance. Our advice covers wills, the use of trusts and other planning arrangements.

## Trusts and Estates

We have a long history of providing trust and estate planning advice, and also taking care of trust administration and tax compliance.

## Corporate Finance

Our focus is on helping smaller and medium sized enterprises which are not always well served by traditional corporate finance houses, and includes reporting and transaction support, advisory, strategic and exit route planning, mergers and acquisitions, business disposals, raising finance and flotations.

## Expatriate Taxation

We help deal with the complexities and red tape that arise when people are seconded overseas and make sure the structure is practical and makes sense in terms of tax and social security charges.

## Other Services

Our London and Birmingham offices provide specialist advice on areas such as corporate recovery and personal insolvency.

## LONDON

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