



listening  
thinking  
delivering



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*JBW Accountants is a multi-disciplined professional services firm specialising in the provision of financial, taxation and strategic solutions for indigenous family businesses.*

## Who we are...



Every business is unique. At JBW Accountants we pride ourselves in our ability to understand the issues affecting **family businesses** and in finding solutions that complement the strategic objectives of those businesses.

Our aim is to provide excellence and **value added services** through our dedicated team of experts. We endeavour to add value to your business by making constructive suggestions to assist you towards improved profitability and increased shareholder wealth.

We welcome the challenge of matching our services to our clients needs. We offer the benefits of a **personalised service** supported with the highest professional and ethical standards. Customer satisfaction is our commitment to you.

Give us a call, to see how we may be of service to you.

John White, CPA  
Principal

## Strategic Services & Succession Planning...

*Your business has grown rapidly. You are at full stretch trying to service the needs of your customers. Your product range or services have increased and diversified in line with your customers demands. Should you expand the business or concentrate on fewer higher margin products / services... Your business is ripe for strategic planning.*

You have reached a crossroads and the direction you choose will ultimately **reshape your business**.

Is your vision a viable proposition? What is your businesses key competencies and do you have the appropriate skills set to achieve your business goals? What steps should you take and in which priority? What is the market position and how strong is the competition? What of the next generation? - after all this is a family business. Should you have rules for family members entering the business? How do you pass on the family business without the penalty of a serious taxation charge? Ultimately you would like to retire in comfort and pass on the family business intact.

Successful strategies have their roots in structured planning and continuous appraisal.

We will assist you in deciding your key objectives as well as performing a detailed self-appraisal, both from the inside looking out and from the outside looking in. We will prepare financial projections and enhance your management reporting systems to assist you in the decision making process.

We have developed a methodology to assist you in making **the right decisions** and allow you to follow a **structured strategic direction**.



*At JBW Accountants we see the statutory audit as a continuous means to better understand your business' issues and as a platform to identify opportunities for your company's development.*

## Auditing & Accountancy Services...



We adopt a **focused approach** to the statutory audit. Our approach identifies the critical risk areas and seeks to assess their impact on the activities of your business. We take a proactive approach to the planning and carrying out the audit and seek to complete it in a short turnaround time.

Our audit does not just assess the result for the year but looks beyond the figures at your internal controls and reporting systems. In doing this we try to **identify opportunities** to enable you to improve the quality of information available to you in making day-to-day business decisions.

Naturally, we perform the audit in compliance with Regulations and Standards. But we do more than just prepare and audit the statutory financial statements. We also leave you with a report on the management reporting and controls systems in place and make recommendations that may **enhance your business operation**.

Our objective is to continually exceed your expectations with a quality audit and a seamless delivery of service.

## Taxation Consultancy & Wealth Management...

*Taxation has become a very complex area with the result that effective tax planning is vital for the development of any business. Proper planning can have a real impact on your business profitability and cash flow.*

Taxation matters under all tax headings continually impact businesses. As businesses develop, their exposures to taxation generally increases but so also does the opportunities for **effective tax planning**.

We provide **practical advice** to individuals and companies and develop creative solutions to taxation issues that complement and enhance your business objectives. We take the burden of compliance work from you and guide you through tax filing minefields.

We draw on the resources of a network of taxation and legal specialists in dealing with the more complex issues. We aim to provide the highest **quality** of service. Consequently, we choose our experts carefully and ensure that they too deliver the highest standards and are highly skilled in their specialist fields.

So, whether you require assistance with complex taxation structures or with filing your tax returns, why not contact us for a personal and professional service.



*From developing a business idea, to raising finance, assessing the viability of a project, recruiting the "right person" for a job, deciding whether to lease or buy an asset, performing a due diligence on a target business or enhancing your businesses control environment, the list is seemingly endless.*

## *Financial & Business Advisory Services...*



We have significant experience in financial and business advisory matters. We recognise the critical importance of early and decisive responses to business problems, by getting to the underlying causes and putting in place a solid platform to enhance your business performance. We provide **practical solutions** with a flexibility to allow you to make changes as your business develops.

We make it our business to **understand** yours and work with you to develop and maximise your business opportunities.

We provide the roadmap so that you can explore and develop your business goals. We will assist you in deciding the optimal financial structures for your business and advise you on the financial needs of your projects and ideas.

If you have the ideas, we can help make them a reality.

## Employment and Rewards Services...

*The ultimate throttle for growth is widely recognised as the ability to recruit and retain enough of the right people.*



For the employee it's no longer simply an issue of salary, while for employer the costs of recruiting and retaining staff continues to increase.

Some of the **cost efficient rewards options** available to employers include pensions, training schemes, share option schemes, performance bonuses, relocation expenses, health insurance, directorships, and much more.

At JBW Accountants we have experience in developing employment and rewards packages. We will help you to develop the right package to enable you to secure the **right people**.

We also have experience at the other end of the scale where changes in economic conditions can lead to re-organisations / re-shaping of the workforce. We can advise you on the **alternatives** to a redundancy program thus ensuring that you hold onto the staff you have invested in.

Your people are your future. Talk to our dedicated employment and rewards team and secure your future.



## Contact Us...

*For assistance in your financial,  
taxation and strategic planning.*



JBW Accountants is a professional services firm specialising in the provision of financial, taxation, accountancy and strategic solutions for family businesses. We pride ourselves in our ability to understand the issues affecting family businesses and in finding solutions that complement the strategic objectives of those businesses.

Contact JBW Accountants for assistance in your financial taxation and strategic planning:

**JBW Accountants**  
Certified Public Accountants & Registered Auditors  
3 Church Street  
Dungarvan  
Co. Waterford

Tel: +353 (0)58 45878 / 45879

Fax: +353 (0)58 48435

E-mail: [info@jbw.ie](mailto:info@jbw.ie)

Website: <http://www.jbw.ie>



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