

# Getting to know WR Partners

Your leading firm of Accountants,  
Business Advisers and Tax Specialists

# About Us

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**We are a firm of dedicated Accountants, Business Advisers and Tax Specialists, fully committed to enhancing and protecting our clients' financial position.**

We have been helping people and businesses succeed for over 120 years. This has only been possible by adopting a forward-thinking and dynamic approach as an organisation. That way, we can help you to respond to any challenges and capitalise on opportunities as they present themselves.

Our people are what make our business special.

We are determined to see our clients thrive, we are passionate about the results, and WR Partners can always be trusted to deliver.





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OFFICES

You can find the team located in Cheshire, Shropshire, Wrexham & Mid-Wales.

230+

TEAM MEMBERS

All striving to help you and your business achieve your goals.

10

AREAS OF EXPERTISE

Accounting and tax services are not all we do. Any organization wishing to build for the future can benefit from our comprehensive suite of bespoke solutions.

9000+

VALUED CLIENTS

We work with a huge range of clients and their businesses within a broad range of sectors and industries.

# Our Approach

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**At WR Partners we are firm believers in offering tailored solutions, all built around you, in order to achieve the best results possible together.**

By actively working with our clients, we are able to develop a deeper understanding of you, your business and your people. This allows us to proactively respond to challenges, as well as identify potential opportunities as they present themselves.

Meaning we can offer a truly bespoke service, helping you to achieve your personal and financial goals.

The staged approach we take with our clients, enables us to maximise your profits and ultimately protect your wealth.



# The 4-Step WR Partners Process

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We are here to support you throughout your business journey – whether you're established, growing, being audited, or looking to exit the business.

**Protect your wealth and protect your future with WR Partners.**

## **Step 1 Discovery:**

We conduct an initial discovery session, taking the time to understand your ambition alongside your compliance needs. We match you up with a support team, chosen because of their experience in your industry or sector.

## **Step 2 Tailored Support:**

You work with us to develop a tailored support package of accountancy and strategic advice to assist you on your business growth journey, focusing on your future goals and providing a service that matches.

## **Step 3 Customised Solutions:**

With your day-to-day needs taken care of, we draw upon our pool of specialists to offer complementary solutions that will help you achieve your goals. We can ensure you maximise tax relief, avoid headaches, and stay on track with your plans.

## **Step 4 Protect:**

We review and reset our offering regularly so that it adapts and ensures you are protected and well-placed to maximise future opportunities.

# Building Your Perfect Package

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After our initial discovery session, we work closely with you to understand what level of service you require.

This flexible model allows us to build a bespoke package for your accountancy and financial management needs based on your business.

Our tailored support package is split into three sections: Compliant Services, Performance Review, and Strategic Support, ensuring you get the hands-on support you want with the right amount of information and guaranteed compliance.



## Compliant Services

Rest assured that you are on top of the essentials:

- Audit & Assurance
- Y/E Accounts
- Personal tax returns (self-assessment)
- Corporation tax returns
- VAT returns
- Company secretarial
- Digital platform bookkeeping
- Construction industry scheme (CIS)
- Registered office fee

## Performance Review

Make decisions with up-to-date information:

- Management Accounts
- Financial Accounts Health Check & Diagnostics
- Digital Accounts Healthcheck
- Performance reviews
- VAT Healthcheck
- Tax Reviews
- Sector Benchmark Reports

## Strategic Support

You can have as much support as you want:

- Strategic Business Planning
- Tax Planning
- Outsourced Finance Director
- Business Advice & Mentoring
- Buying, selling, growing business
- Financial Forecasting

# Our Services

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We know how important it is for our clients to feel understood and valued, so we have set benchmarks for our teams to meet and exceed. This ensures that we always deliver the highest levels of service.

Our recurring services help you remain compliant with your annual accounting obligations.

While we pride ourselves on excelling in compliance services, including meticulous annual accounts, comprehensive audits, and precise personal tax or VAT returns, our true passion lies in paving the path to your prosperity with a suite of complementary solutions.



## Business Advice

Do you have a clear roadmap leading to your business and personal financial goals? Our advisers can help you develop a strategic plan and support you in implementing it.

## Forensic Accounting & Investigations Services

We pride ourselves on our ability to deliver exceptional value for our clients. Our goal is not just to resolve disputes and provide financial analysis, but also to help our clients achieve their business objectives.

## Payroll Services

Does your valuable time get taken up processing payroll? We can remove this burden, saving you time and money and keeping your payroll running smoothly and efficiently.

## Planning Your Exit

It's all about protecting your future (it's our tagline). We'll work with you to make sure you're financially future-proofed in every circumstance.

## Planning Your Future

As experienced Business Advisers, we help you set and achieve your goals both financially and strategically.

## Property Management

We have a specialist team focused on service charge accounts.

## Outsourced Finance Support

We can help the business get up to date management information whilst keeping an eye on KPI's such as gross margin levels and overheads.

## Tax Consultancy

Are your affairs proactively managed to ensure they are tax efficient? Our dedicated team can help you manage your tax risks and ensure you are accessing all available reliefs.

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When it comes to WR Partners, I absolutely trust their judgement, and I trust that they are there to help us.

**Nick Evans, Cymryd Rhan**

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# Sector Expertise

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WR Partners are far more than just your standard accountants and tax specialists. We provide a full range of bespoke solutions which are ideal for any ambitious business looking to build towards the future.

## Academies

With a long history of providing advice to our clients in the education sector, you can rely on WR Partners to provide the specialist experience and knowledge required to not only support the academy/free school in its responsibilities to meet regulatory requirements but also in its development.

## Automotive Businesses

With a deep understanding of the automotive sector, we exist to bring innovative solutions, industry-specific guidance, and effortless compliance to car dealerships across the UK.

## Charities & Non-Profits

With almost half of our audit clients coming from the charities and not-for-profit sector, we pride ourselves on our understanding and knowledge of the issues which are important to you. With its rapidly changing landscape and external challenges, it is crucial to select professional advisors with expertise and experience to provide you with support and advice you can rely on.

## Equine

With expertise in the unique equine sector, WR Partners has built a strong reputation by offering deep industry insight and personalised solutions to help your business thrive.

## Family Businesses

Supporting family businesses lies at the heart of WR Partners. Running a family business can be both challenging and rewarding and we are committed to working with you to realise your goals and ambitions and support you in achieving the lifestyle you desire.

## Dentists & Dental Surgeries

WR Partners offers professional accountancy services tailored to the needs of dentists, allowing you to reduce costs, streamline operations, and safeguard the financial growth of your dental practice. We understand the financial intricacies of the dental industry and are equipped with the knowledge and expertise to save you time and money.

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WR Partners provide an excellent service to Derwen College and have done so for many years. The communication from the WR team is excellent and the service provided is very efficient, effective, and always on time.

**Andrew Smith Derwen College**

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# Sector Expertise

## International Business

We provide support and advice to international businesses with UK operations or seeking to expand operations into the UK; and to UK businesses with operations abroad or seeking to expand operations into different territories.

## Independent Schools

At WR Partners we have a long history, depth, and breadth of experience in supporting Independent Schools and you can rely on us to provide the specialist sector knowledge and technical expertise to support you in meeting your regulatory responsibilities and achieving your goals and ambitions. Our experienced and knowledgeable team places great emphasis on working in partnership with you to understand your needs, opportunities, challenges, and ambitions.

## Landed Estates

At WR Partners, we represent over 65 families with landed estates across England and Wales, managing around 500 trusts. We advise individuals, trusts, companies, and partnerships on both day-to-day compliance and the broader structuring of their affairs. Our bespoke service keeps the family's long-term plans at the forefront.

## Manufacturing

Our trusted team helps manufacturing companies throughout each stage of the business life cycle from start-up to business succession. Our wealth of experience and range of service ensures a tailored solution can be found for all our manufacturing clients' needs.

## Tourism & Hospitality

We offer tailored financial solutions for tourism and hospitality businesses, encompassing accounting, tax, audit, and advisory services, designed to boost profitability and streamline operations.

## Rural Accounting & Advisory Services

Our experienced dynamic and proactive team of professionals specialise in farming and rural accounting and advisory services, boasting a deep understanding of the sector's intricacies. With a track record of delivering tailored solutions, we ensure compliance, maximise tax efficiency, and support clients with long-term success.

We provide comprehensive financial solutions tailored to the specific needs of rural businesses and individuals, offering expert guidance and support every step of the way.

## Shops & Retail

Fluctuating trading conditions and changes in government regulation in areas including rates, taxation and National Insurance and pensions are adding to the challenges faced by retail businesses. At WR Partners we have a long history, depth, and breadth of experience in supporting businesses in the retail sector.

## Technology

The pace of technological change presents significant opportunities and challenges to the tech sector. At WR Partners we have a long history, depth, and breadth of experience in supporting businesses in the technology sector.

## Solicitors, Lawyers & Legal Professionals

At WR Partners, we pride ourselves on being the go-to accountants for solicitors, lawyers, and legal professionals. Our team of specialist accountants for solicitors brings a wealth of expertise in all areas pertaining to the legal profession, ensuring that our clients comply with industry regulations such as the Solicitors Regulation Authority (SRA) and the Legal Services Act.



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WR Partners have acted as our auditors for several years. Working with a capable, well-resourced firm that truly understands our business is key for us and the team at WR Partners are accessible at all levels and invest the time to understand and support our growing business. The team are professional, personable and provide insightful challenge and we wouldn't hesitate to recommend them.

**Greenhous Group**

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In our first year of audit with WR Partners, we experienced a smooth transition. Their professional approach, support and fantastic team made the process reassuring and efficient. WR Partners expertise extends beyond the standard audit, particularly in understanding charitable organisations and rural clients. Throughout the audit, WR Partners were responsive and accessible, and their collaborative approach ensured that we felt fully engaged in the process. I can highly recommend WR Partners and look forward to our continued partnership.

### **Royal Welsh Agricultural Society**

It was a pleasure to work with Andy, James, Charlie, and the team at WR Partners on the sale of Morris Care which was another significant step in the Morris Group 153-year journey. The whole team at WR Partners worked closely with us throughout the sale process providing quality advice in a timely manner reflecting our own commercial philosophy – “Excellence as Standard”.

### **Morris & Company**

We have been impressed with WR Partners audit process, which is supported by great technology and knowledgeable staff, creating an efficient and professional audit. The WR Partners team also supported us to successfully re-structure our business. Their expertise and strategic guidance have helped us build a stronger financial foundation for our group. In addition, WR Partners have provided us with clear, practical, and actionable support relating to accounting, VAT, and tax.

### **Charlies Stores**

WR Partners have a good understanding of our business which helps when discussing some of the more technical & complex areas of the audit. We have a great relationship with the audit team who deliver a great service and insight and know our business well.

### **Enreach**

Their expertise and personalised approach have significantly improved our finance operations. The team’s dedication and insight have been invaluable, helping us navigate challenges and achieve our goals. I highly recommend WR Partners for their exceptional service and commitment to client success.

### **H-Pack Packaging UK.LTD.**

WR Partners have been our auditors since 2019, and my team and our Board of Trustees are very happy with the service provided. WR Partners provide a good balance of challenge and support which creates a relationship where we can approach WR Partners throughout the year to discuss issues or ask for guidance which makes the year end audit process smoother. The pre-audit planning is well conducted so we are all aware of the information requirements and the timescales to be met with dates adjusted to fit in with our priorities. WR Partners understand our industry and I have confidence with the guidance they provide.

### **Holstein UK**





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# Get in touch

Contact us for support or more information  
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Accountants, Tax & Business Advisors

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