



Your Complimentary Client Review meeting

We're here to make a real difference to our clients...

Delivering a high-quality, efficient compliance service is just a part of that. Helping you to develop, improve and grow your business is the next step. As a valued client, you can have one Complimentary Client Review (CCR) per year. A CCR stimulates strategic discussion and identifies burning issues, opportunities and challenges so that you can respond effectively. It's also an opportunity for our team to identify greater tax efficiencies and asset protection.

A CCR meeting is an ideal opportunity for you to meet with us on a no charge, no obligation basis to discuss any of the following:

- Your goals for your business and how you plan to achieve them.
- How your business goals tie in with your personal and lifestyle goals.
- Issues and challenges you are facing in your business e.g. growth, profitability, cashflow, a planned exit from or sale of your business.
- How you can work with us to address these issues and plans.

Keen to improve your business performance, financial results and minimise any risk in your investments? Book a CCR now.

At your CCR meeting we'll review your current situation at no cost. It is an opportunity for us to check in with you to be sure that we're giving you all of the assistance that you need.

The benefits:

- Set SMART goals and gain clarity about actions you'll take to achieve them
- Stimulate strategic discussion affecting your future direction
- Gain access to our collective wisdom
- Potentially identify greater tax efficiencies
- Identify burning issues, opportunities and challenges to respond effectively
- Understand and manage your business better
- Identify areas where we can assist you to unlock further potential

The CCR Process

You'll have a free 60 minute consultation with a senior team member. We'll send you a copy of the meeting minutes and document all agreed actions. If required we will also prepare a proposal for you with upfront prices of our services for any additional support work.



Call us today to book in a Complimentary Client Review meeting 01242 528412 - stephen@cheltenhamtaxaccountants.co.uk