

UNLOCKING SUCCESS

How a pre year end meeting and early planning helped our client towards achieving their ambitious goal

CLIENT BACKGROUND

A Derby-based business specialising in selling and fitting premium uPVC windows, doors, and conservatories has been thriving since 2021. Known for their quality work and outstanding service, they've grown steadily, thanks to happy customers spreading the word.

THE DREAM

Looking to the future, the business had ambitions to own their own site. This milestone was not only a step towards accommodating their growth but also a way to enhance their reputation in the industry. However, achieving this dream would require a clear financial strategy and careful planning.

THE SOLUTION

To help make their vision a reality, strategies were tailored to align financial planning with their long-term goals. There were real business challenges between cash requirements, business growth plans and investing in their property that all needed serious thought and careful decision-making – this made for a robust but valuable pre-year end meeting. After thorough discussions, they chose an innovative route: leveraging pension contributions to build a fund for the future acquisition of commercial property.

This strategic choice resulted in a £15k corporation tax saving and well on their way to meeting their dream of owning their own property.

Additionally, during a review of their Xero accounting package, adjustments and tweaks were identified to optimise processes and save time. Small changes made a big difference, saving them time leading to greater efficiency and satisfaction with the streamlined workflows.

OUR COMMITMENT

This business is a great example of how big dreams can become reality with the right support and planning. By thinking ahead and asking the right questions, they set themselves up for long-term success—and we're proud to be part of their journey.

At Cedar + Co., we don't just prepare accounts and file tax returns—that's the baseline of what any accountant should do. We focus on making a positive difference to our clients' businesses, helping them achieve their goals through tailored advice and proactive support.

If you want to have a positive difference discussion about the future of your business or the way you use your accounts software let's get together. Simply give us a call or drop us an email!



CLIENT FEEDBACK

"I just wanted to say a huge thank you for the pre-year-end meeting. Not only did you save us lots of money in tax, you have helped us towards achieving our goals, I knew what I wanted to achieve and where I wanted to get to, so this pre year end meeting was extremely helpful in helping us get on the road.

Also, the time-saving tips that Molly gave us for Xero are brilliant—we had no idea what we were missing!

Taking just an hour out of the business to chat with Gary has made such a positive difference. Thank you!"



The Green House
"106-108 Ashbourne Road
Derby
DE22 3AG

01332 292022
www.cedarandco.co.uk
advce@cedarandco.co.uk