

# Albert Goodman

CHARTERED ACCOUNTANTS,  
TAX CONSULTANTS  
& FINANCIAL PLANNERS

Simply delivering results



# Whole life planning under one roof

Your priorities will change throughout life, Albert Goodman can help you take control of tomorrow, today.

We offer advice tailored to the everyday needs of you, your family and your business winning us the trust of generation after generation of loyal clients. Our aim has always been to build lifelong partnerships with our clients and become the natural first choice for advice they know they can rely upon at every stage of life.

We've been helping clients plan ahead for the good times and be properly prepared for whatever else may come their way for nearly 150 years. This tradition of practical, straightforward advice continues today, dealing day-to-day with the immediate and long term needs of individuals, families and their businesses.

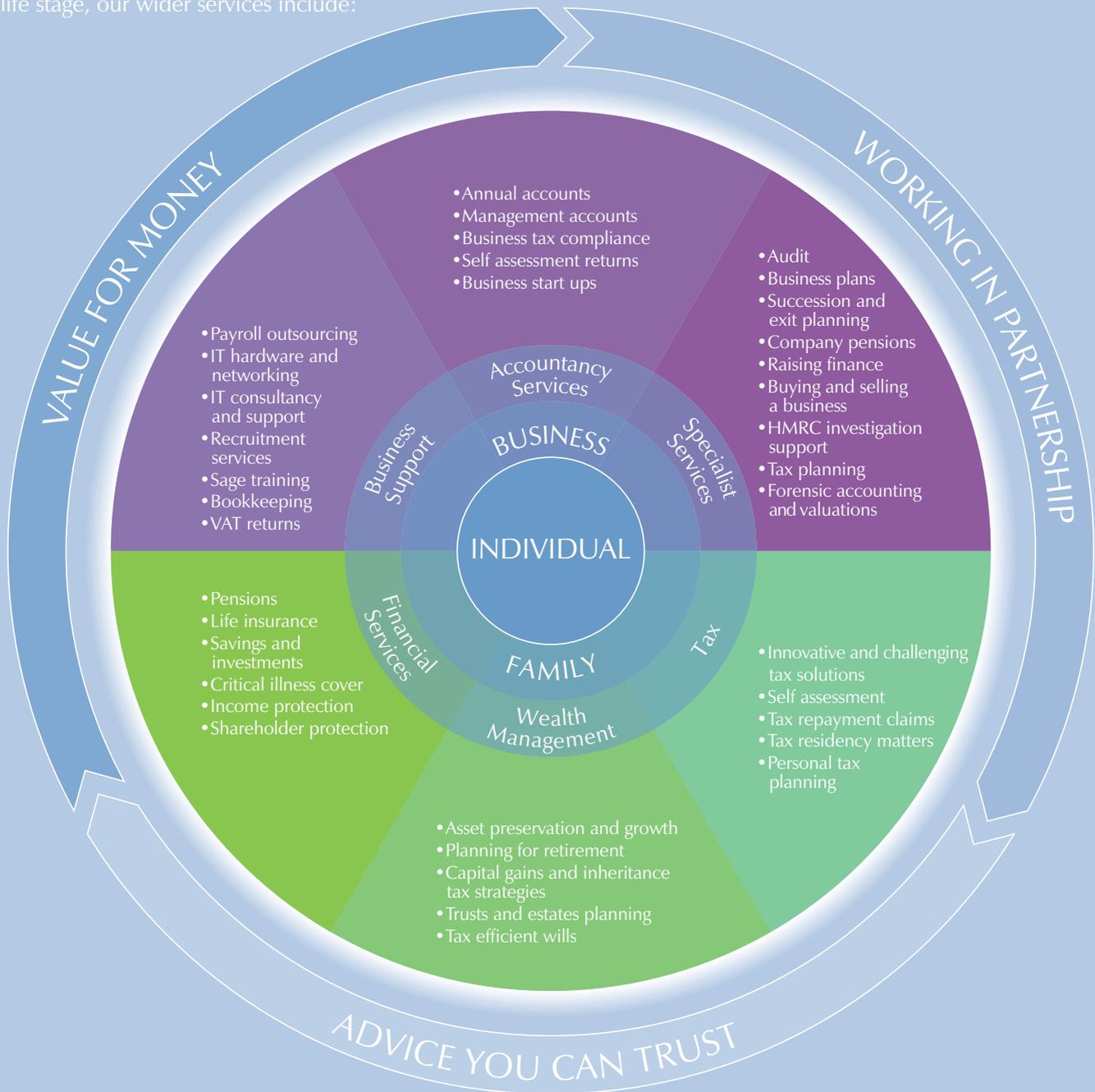
We look at your needs from an all-round perspective – where you are now, your aspirations for the future and what steps you should be taking to prepare for all the ups and downs that might lie ahead. This is especially important when developing appropriate solutions for multi-generational businesses.

Our advice and services are designed to suit individuals and families according to the different phases of their life including into later years, and to suit businesses to match their stage of development; from starting up, through growth and expansion, to succession and exit.

OUR TECHNICAL  
EXCELLENCE IS A  
GIVEN – IT'S  
HELPING YOU  
REACH YOUR  
GOALS THAT  
SETS US APART



Corresponding to your personal or business life stage, our wider services include:



# Quality advice with you and your business at its heart

When it comes to finding the best support for you and your business, we believe Albert Goodman is the natural choice.

Our experts work around you and your needs to deliver quality technical advice. We take pride in our friendly, straight-forward and plain-speaking approach. We take time to understand you and your business and with a 'can do' approach ensure you meet your objectives.

We earn the loyalty and respect of our clients by putting their interests at the heart of everything we do. Our partners deal direct with clients because we recognise that personal relationships are essential to obtain a long-term view that cannot be derived from financial numbers alone.

Albert Goodman has a long history of providing quality accountancy services, tax advice and financial planning to individuals, families and their businesses throughout the South West, and beyond. Traditional service values remain at the core of our organisation.

We have 'big firm' capability but deliver locally with a 'small firm' personal service. So for a practical, effective and dedicated approach, choose Albert Goodman.

We are proud to make your business our business.

**BUSINESS, TAX  
AND FINANCIAL  
ADVICE THAT'S  
TAILORED TO  
YOUR NEEDS**



# The principles by which we operate

We regard technical excellence as a given – our key staff are among the best in their field throughout the South West. We differ in that we truly get beneath the surface of our clients, to fully appreciate their personal and business motivations.

We assess businesses and individuals in the whole; giving practical and proactive advice grounded in the commercial realities of your business and helping you achieve your long-term objectives.

We believe in timeliness – delivering when we say we will. Our competitive regional rates ensure that our advice is cost effective, with no compromise on quality.

We recruit recognised experts, many from National firms and the Big 4, and develop our own staff so that we have

the full range of services required by our clients. Consequently we don't muddle through; we draw upon our full-time experts to deal with the most complex, intimidating and onerous matters for both our clients' personal and business affairs.

We aim to agree a fee structure from the start of our relationship with you, and put you in control when it comes to costs. This way every client receives a high level of care as we work around your needs – adapting our services, and our diaries, to suit you.

Our friendly and approachable staff work hard to build strong client relationships that last into the future.

ADVICE THAT'S  
PRACTICAL,  
PROACTIVE AND  
GROUNDED



# Simply delivering results



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