

Our valuation services

About Saffery

At Saffery, we're more than just chartered accountants and business advisers. We're a partner-led and people-focused firm, committed to our clients and honouring our heritage – it's the core of who we are.

We help our personal and corporate clients to structure their affairs and navigate their commercial and tax responsibilities in a practical, commercial way that is tailored to their individual circumstances. Our clients' goals and priorities are at the very forefront of what we do.

We take the time to understand the issues that drive our clients and we dedicate ourselves to understanding our clients' circumstances. We'll simplify the complex, make reliable recommendations, and turn advice into action.

We have extensive experience of working seamlessly alongside lawyers, other accountants and advisers in meeting our clients' goals. And as a proud member of Nexia, a worldwide network of trusted member firms, we've got access to local insight on a global scale.

Saffery in numbers

1,300

people

9

UK offices

6

International
offices

£122m

turnover in 2024

15th

largest accountancy
firm by fee income

Our values



Collegiate



Excellence



Enthusiastic



Integrity

Valuation services

We provide a full suite of valuation services for a variety of purposes and situations including both commercial and specialist tax valuations. We always act in the commercial interests of our clients whilst remaining independent and abiding by relevant valuation best practice.

Commercial valuations

Within our team we have a wealth of experience in completing valuation assignments for a range of different commercial circumstances.



Shareholder disputes

Matrimonial cases

Transaction support/purchase price adjustments

Tax valuations

We work very closely with our in-house tax experts and can provide expert tax valuation advice in a range of difficult circumstances.

Recent announcements of future changes to the IHT rules will likely result in tax valuations becoming more prevalent.



Employee incentivisation

Group re-organisation support

Estate planning and IHT

Valuation approach

The circumstances and requirements for carrying out valuations can vary significantly. We invest heavily in understanding these, both up-front and throughout an assignment to ensure all pertinent factors are taken into account and that the most appropriate valuation approach is applied.



Understanding

This stage includes an initial meeting/call to allow us to develop an understanding of the purpose of the valuation, the business and the business' trading environment.

We will confirm information required and agree a deliverable.

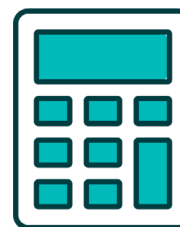


Methodology

Once an understanding of the business, its industry and its trading performance have been developed, we will determine an appropriate valuation methodology.

Common methodologies include capitalised earnings, net assets and discounted cash flows.

We will often use a second methodology as a cross check.



Calculation

Once a methodology/ methodologies have been determined, we will carry out our valuation calculation.

This may involve various adjustments to financial information provided by you which will be determined in follow up conversations.



Report

Once a calculation has been completed, the valuation report will be created.

A draft will be circulated to invite comment and for you to confirm the factual accuracy of information that has been provided by you.

Once this process has been completed, any changes that are required to the report will be processed and a final report will be issued. If this is a tax valuation, it will be in a format that can be submitted to HMRC.

Our team



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