

Fortus

leading the ambitious

Contents

Who are Fortus?	03
Why are Fortus different?	04
The Fortus way	06
One team, many talents	08
Our service lines	10
Our specialisms	26
Fortus in numbers	28
Corporate social responsibility	30
Carbon neutral status	32
Client satisfaction	34
Client story	36
Contact us	38



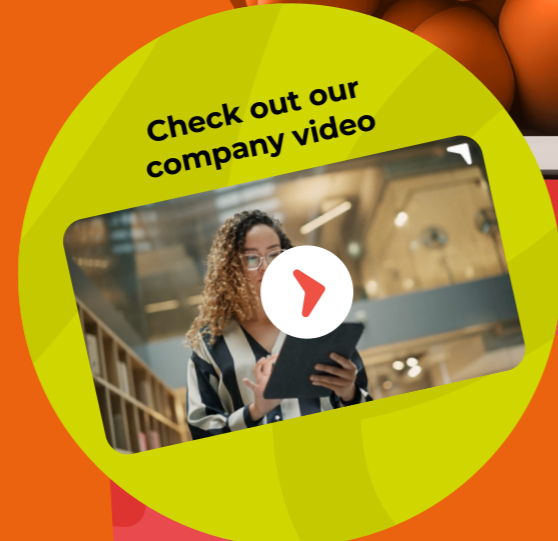
We mean business

Every business journey encounters unknowns - shifting markets, tough decisions, moments of doubt. We act as your propulsion system: engineered to cut through complexity, fine-tune your expansion, and keep you moving toward what's next with clarity and control.

97% client retention

4,500+ clients

Supporting 14,500 business leaders





Who are Fortus?

At our core, we're business advisors and accountants who've spent decades helping ambitious business owners move forward with confidence.

If you're ready to grow, evolve, or take bold steps in your business, you're exactly who we're built to support.

We don't define our clients by size or sector - we look at mindset. If you're forward-thinking and ready to make decisions that shape your future, we're here to help you make them count.

Why are Fortus different?

At Fortus, we're here for the ambitious - the business owners who want more. Yes, we're accountants, but we're also trusted advisors, walking alongside our clients with smart advice, fresh thinking, and clarity that cuts through the financial fog.

We're all about building lasting relationships, doing great work, and we really are good at it. So much so, that our clients consistently outperform their peers because we focus on what really matters - helping them grow, adapt, and stay ahead.

We genuinely care too - that's why we created our own Fortus Foundation, dedicating 1% of both our profits and turnover to meaningful causes. We're also committed to reducing our carbon footprint every step of the way.

We understand the challenges of being a growing business, because we've been there, so we're here and ready to go there again with you.

“I’m focused on creating real value for clients through clear, practical support that drives results - with a curious, committed team that builds lasting relationships and grows with you.”



Craig Herbert
CEO

The Fortus way

We're **client obsessed**, dedicated to delivering a world-class service, always striving to provide the best solutions for our clients. We **embrace curiosity**, constantly seeking new ideas and innovative approaches through continuous learning and inquiry. By **sharing our expertise**, we lead the way today while anticipating the needs of tomorrow. We pride ourselves on being **straightforward and honest**, building trust and simplifying finances for our clients. We bring energy, fun, enthusiasm, and resilience to everything we do, helping businesses and our team members thrive and grow.

#WeAreFortus



One team, many talents

We work with many of the UK's most ambitious businesses - organisations that want advice shaped by experience, not off-the-shelf solutions. Our strength lies in our people: a team with the judgement, perspective, and practical know-how to help you navigate growth in both business and personal life.

And yes, we talk about you behind your back. When the doors close, our specialists connect and challenge each other to make sure you get the very best of us. You don't just have one adviser - you have the collective knowledge of a whole team.

The result: sharper advice, deeper insight, and people who are fully invested in your success.

Our service lines

Running a business isn't simple - and neither are the questions that come with it. From big-picture planning to day-to-day decisions around cash flow, investment, property, and more, you need more than just one type of support.

That's where we come in.

We're here with the right mix of services to cater for the essentials your business needs all under one roof. And when the unexpected hits, we've got you covered there too - all to keep your ambition moving in the right direction.





Accounts & Business Advisory

You shouldn't need a finance degree to run a successful business. That's our job - to make sense of the numbers and turn them into something useful. At Fortus, we give you clear, accurate financials and help you understand what they actually mean for your business. We'll work with you to spot the key insights, set the right KPIs, and make sure your data is doing more than sitting in a spreadsheet - helping you make smarter decisions every day.



Jackie Senior
Partner - Group Head of
Accounts and Business Advisory

Payroll

Getting payroll right matters - and when it goes wrong, everyone feels it. With changing legislation and complex workforces, it takes the right tech and expertise to keep things running smoothly. Outsourcing to Fortus means no stress, no surprises - just a trusted team making sure your people are paid accurately and on time, every time.



Vicki Myers-Hewitson
Head of Payroll





Tax Advisory

Tackling tax with the right advice and planning can make a huge difference to the success of your business and mistakes can be very costly. Our expert knowledge won't just ensure tax compliance. We can work with you across business succession planning, inheritance tax planning, property tax planning and business structure - so you can plan smarter, stay ahead, and unlock real value.



Chris Wilson
Partner - Head of
Tax Advisory

Audit

An audit isn't just about ticking boxes - it's about adding real value. Whether you need one legally or just want added reassurance and credibility, an audit can give you a clear picture of how part, or all, of your business is really doing. At Fortus, our approach is collaborative and low-stress. We're not here to catch you out. We'll work with you to highlight risks, strengthen your financial position and move forward with confidence.



Michelle Rapson
Audit Partner & Group
Technical Lead



Wealth Management

We know that wealth management can feel daunting. The choices are endless, the jargon is confusing, and trusting the right advisor isn't always easy. That's why we do things differently.

At Fortus, we're not tied to any providers. We're whole-of-market, fully independent, and here to guide you through an ever-changing financial landscape with clarity, purpose, and confidence.

Whether you're planning for retirement, looking at long-term investments, exploring tax-efficient opportunities, or considering how best to pass wealth on—our advice is always clear, no-nonsense, and completely tailored to you. No off-the-shelf solutions. No pressure. Just thoughtful, trusted guidance built around your goals, values, and future plans.

And because we work holistically across multiple Fortus service lines, we can offer more than traditional financial advice—we provide a complete picture, grounded in a deep understanding of your life, business, and legacy.



Dom Marley
Partner - Head of
Wealth Management



R&D Tax Reliefs



We help businesses plan, run, and deliver R&D and innovation projects more effectively. Our independent project management services combine technical expertise with commercial insight, supporting you across the full innovation lifecycle - from business case development to R&D tax relief claims.

We offer practical tools, templates, and consultancy that fit your way of working, helping you define scope, allocate resources, manage risk, and track progress. Our structured approach strengthens internal systems, reduces admin time, and improves claim accuracy.

We don't just support compliance - we help you build lasting project capability, enabling confident leadership and long-term value. With experience across sectors and a deep understanding of R&D legislation, we ensure your innovation efforts are both impactful and fully supported.



Ryan Conradie
Head of R&D Tax Reliefs

VAT

VAT can be complicated – but it doesn't have to be a burden. Whether you're a business or a not-for-profit, our VAT specialists are here to help you register, manage reliefs, avoid penalties, or resolve disputes. Whatever the issue, you'll get straightforward advice and first-class support when you need it.



Laura Train
VAT Manager

Business Finance

At Fortus, all your business finance, property finance and solutions are under one roof - making it easier to get the right support at every stage of your business journey. We only work with trusted providers and take a whole-of-market approach, so we're never tied to one lender or product. That means more choice, tailored solutions, and peace of mind that you're getting what's right for your business - not just what's available.



Richard Swan
Head of Business Finance

Tax Compliance

Most people just want to hold on to more of what they've worked hard to earn - and protect their family's future. But with shifting tax rules and complex legislation, that's easier said than done. At Fortus, we think about tax, so you don't have to. We'll help you make smart, efficient decisions that maximise your personal wealth, save your business money, and support the people who matter most.



Liz Rogers
Partner - Head of
Tax Compliance



Outsourced Financial Director

Our Outsourced FD service gives you the strategic financial leadership you need - without the full-time cost. Whether you're growing fast, tackling challenges, or just want sharper financial insight, our experienced FDs become a trusted part of your team. They'll help you plan, perform, and make confident decisions that move your business forward.



Rich Carrick
Partner - Head of Accounts and
Business Advisory (Scarborough)



Company Secretarial

Our Company Secretarial service keeps your business compliant and well-run behind the scenes. From filing returns and maintaining registers to advising on governance, we take care of the details so you can focus on the bigger picture. Whether you're just starting out or scaling up, we'll help you meet your legal responsibilities with confidence and ease.



Debbie Wilsher
Company Secretarial
Administrator

Capital Allowances

Our Capital Allowances service helps you uncover hidden tax relief in your commercial property. Whether you've bought or upgraded a building, our experts will assess your eligibility and identify unclaimed allowances that could reduce your tax bill. If there's a claim to be made, we'll handle the whole process - including dealing with HMRC - so you get the financial benefit without the hassle.



Chris Roberts
Head of Capital Allowances





International

Whether you're trading internationally, expanding into the UK, or just starting to explore global opportunities, our team is here to help. As part of Morison Global - the 10th largest international network of professional service firms - we give you access to expert advice in over 75 countries, with local insight and global reach to match your ambitions.



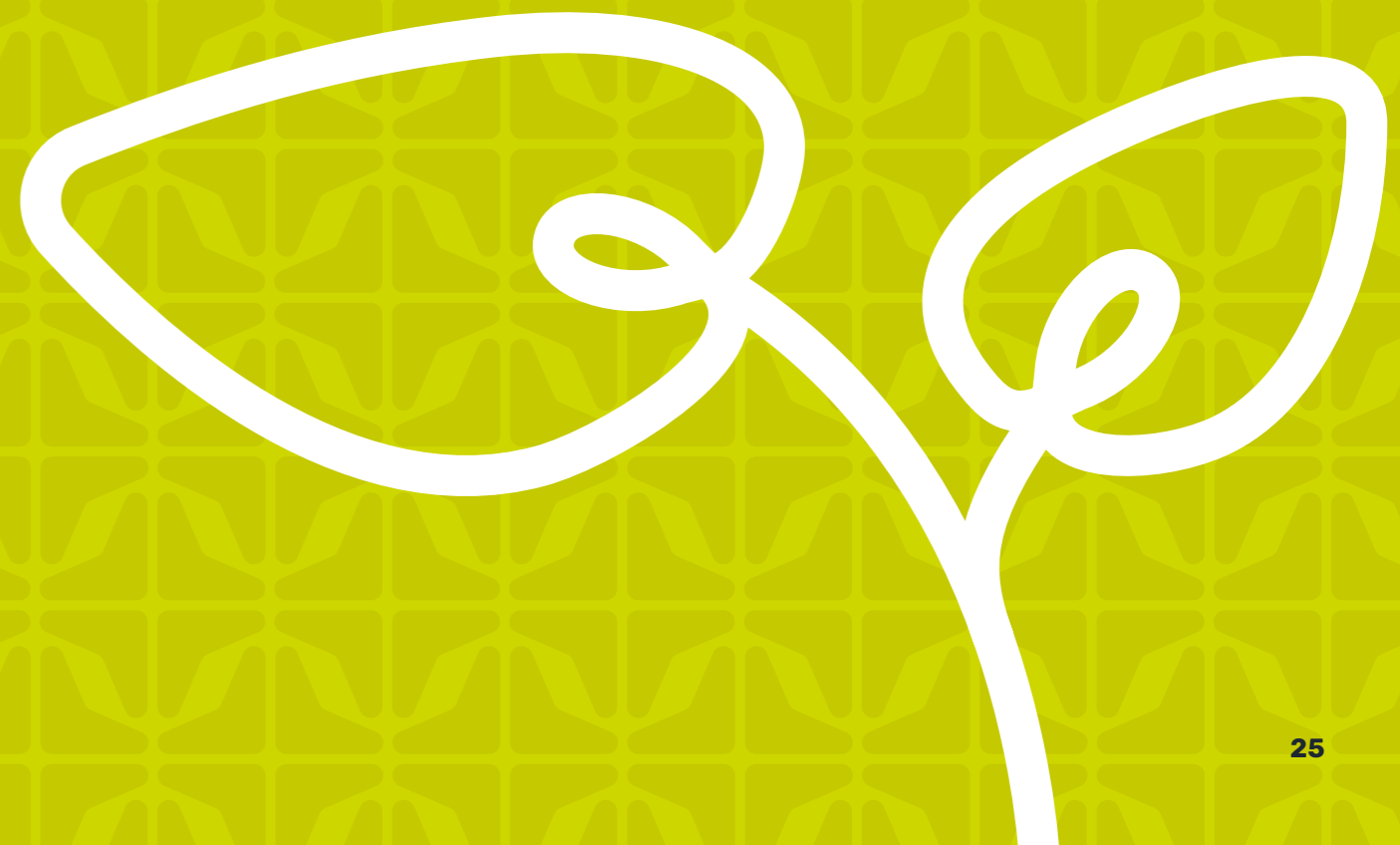
Rich Burnett
Chief Marketing Officer

Sustainability

At Fortus, we help businesses reduce emissions, manage costs, and navigate sustainability challenges with practical, hands-on support. From energy and carbon management to environmental compliance and funded improvement projects, we work alongside your team to deliver measurable results that make commercial and environmental sense. Grounded in real-world experience across Yorkshire, we provide honest, flexible guidance that helps businesses build resilience, unlock opportunities, and take confident steps towards a more sustainable future.



Helen Sprakes
Head of Fortus
Sustainability



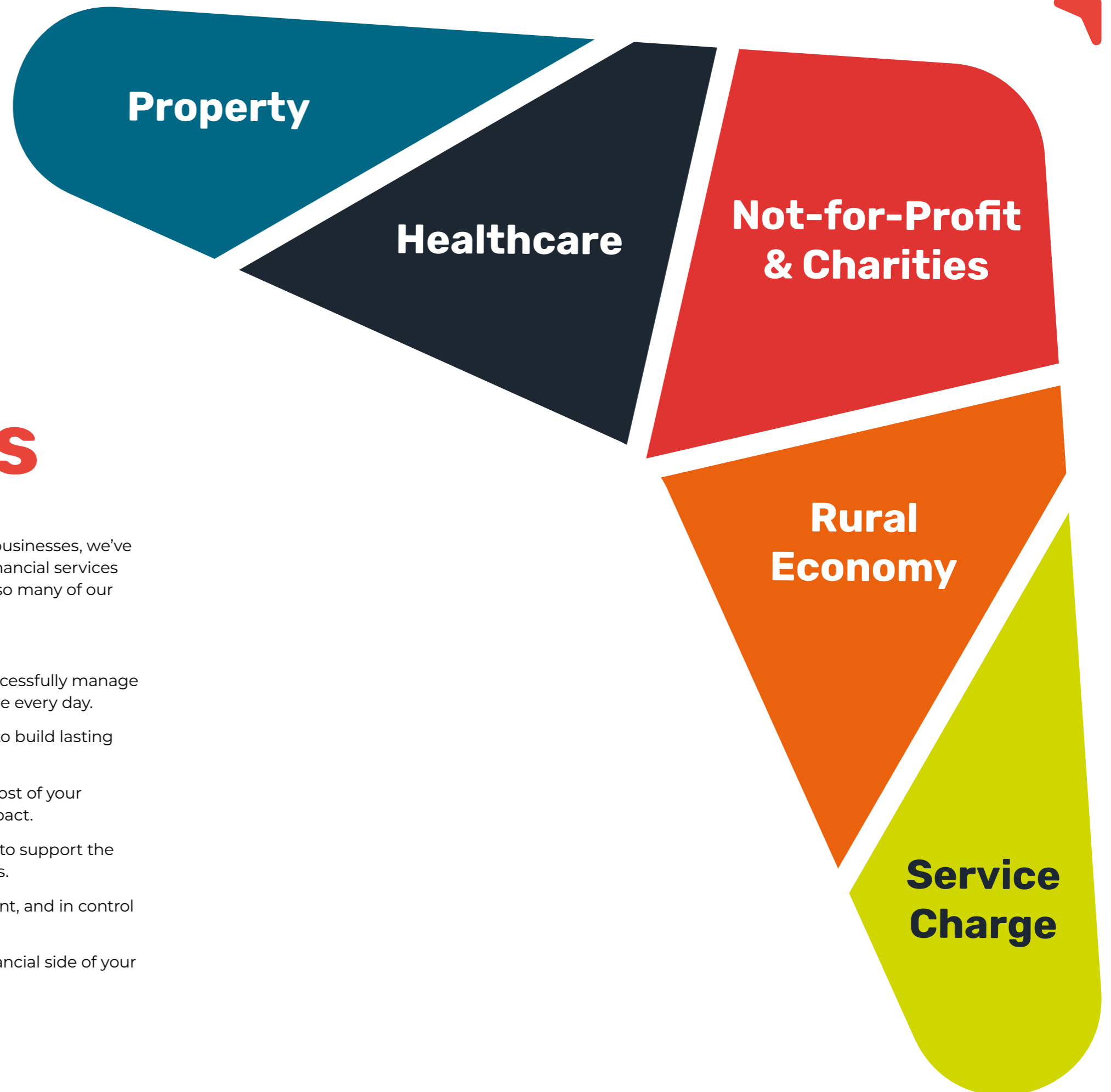
Our specialisms

Alongside our experience supporting small and growing businesses, we've built deep expertise in key sectors - allowing us to offer financial services that are truly tailored and make a real difference. It's why so many of our clients go on to outperform their peers.

Here's how we can support you:

- SMEs – we've grown our business and can help you successfully manage the same challenges small and medium companies face every day.
- Healthcare – we work with providers and practitioners to build lasting financial stability and support sustainable growth.
- Not-for-Profits and Charities – we help you make the most of your resources, so you can focus on creating meaningful impact.
- Rural Economy – we offer grounded, insight-led advice to support the unique needs of agricultural and land-based businesses.
- Service Charge – we help you stay transparent, compliant, and in control of your property finances.

Wherever you're coming from, we're here to make the financial side of your work feel clearer, smarter, and more manageable.



Fortus in numbers



14
service lines

Over
100
team members

More than
4500
clients

3
locations across Yorkshire

5
specialist
sectors

£9m
turnover

£35k
donated locally by the
Fortus Foundation

FORTUS FOUNDATION.



Corporate social responsibility (CSR)

At Fortus, giving back is built into our DNA.

We launched the Fortus Foundation in 2024 to better support local causes across Yorkshire - cutting out the red tape that slows charities down and giving smaller organisations the boost they need to do more good, with less hassle.

This isn't traditional CSR. Our model simplifies funding altogether. Instead of complex grant applications and reporting, we offer support, community, and shared expertise - so those doing the hard work aren't doing it alone.

From hands-on volunteering to our "Go Give One" campaign, our team is actively involved in making a difference. And we're helping other businesses do the same - without the usual CSR overwhelm.

When you donate through the Fortus Foundation, we handle everything: finding worthy causes, making smart grants, tracking the impact. No admin. No stress. Just meaningful giving, made simple.

Work with Fortus, and you're backing a business that believes in success - and using it for good.

Learn more at fortusfoundation.co.uk.

We've achieved carbon neutral status!

We've officially achieved carbon neutral status, offsetting 19 tonnes of CO₂ through the CIKEL Brazilian Amazon REDD APD Project. This initiative combats deforestation and promotes sustainable forest management in Brazil's Para state, preserving biodiversity and supporting local communities.

By choosing to support this globally accredited project with wide-reaching impact, we've taken a meaningful step towards reducing our environmental footprint. We're proud to stand alongside companies like KPMG and Telefonica in this important work. This is just the beginning of our journey to a more sustainable future.



Our net promoter score is...

71



"Very easy to deal with and very knowledgeable"



"The team have been incredibly helpful with both the services provided and the advice given"

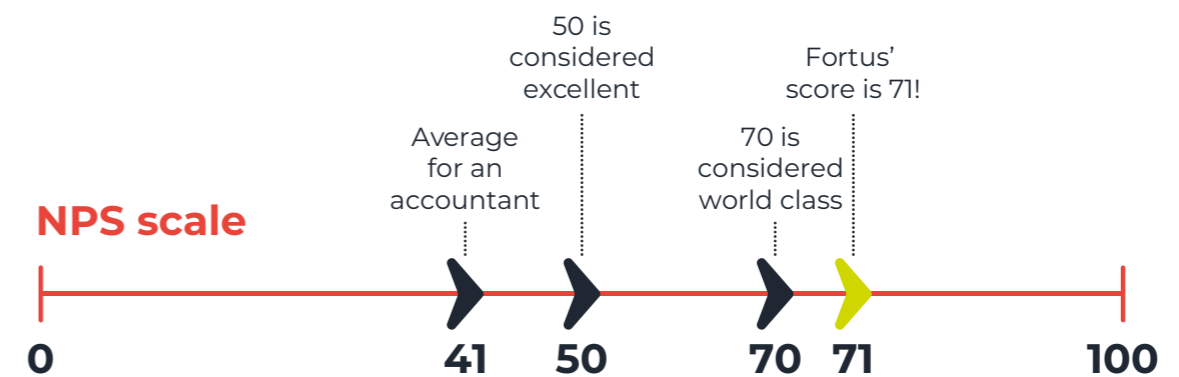


"I would highly recommend Fortus to anyone"

Net promoter score

Q: How likely are our customers to recommend us to a friend or colleague?
A: Very!

Net Promoter Score (NPS) is a metric used to measure customer loyalty and satisfaction with a company, product, or service. It gauges the likelihood of customers recommending a company to others, based on their experience, and at Fortus, ours is considered world class.



Powering partnerships

How Fortus delivered more than just an audit

Since their founding in 1935, our client, a Scarborough-based power supplier, has built a strong reputation for providing reliable back-up power solutions to national blue-chip customers. Today, they deliver 24/7 support and emergency call-outs through a UK-wide team of 80 service managers and over 230 staff. With a 2022 turnover of £25.1 million, they offer an extensive range of power supply products and full asset lifecycle management, including service and maintenance for generators and UPS systems.

Generating a relationship

With a structure comprising three holding companies and an operating company, plus private equity backing, the client sought a new audit and corporation tax compliance provider. Cost was a consideration, but the real priority was a partner who could offer:

- A smooth, efficient process with minimal disruption
- A proactive, Director-led service with access to specialist support
- Coordination across audit, tax, and advisory services
- Open dialogue, with strategic insight and opportunities

Bright sparks

We delivered what competitors couldn't: no-nonsense advice, seamless service lines, and a dedicated relationship lead to coordinate the process and support the wider client team.



Our audit approach

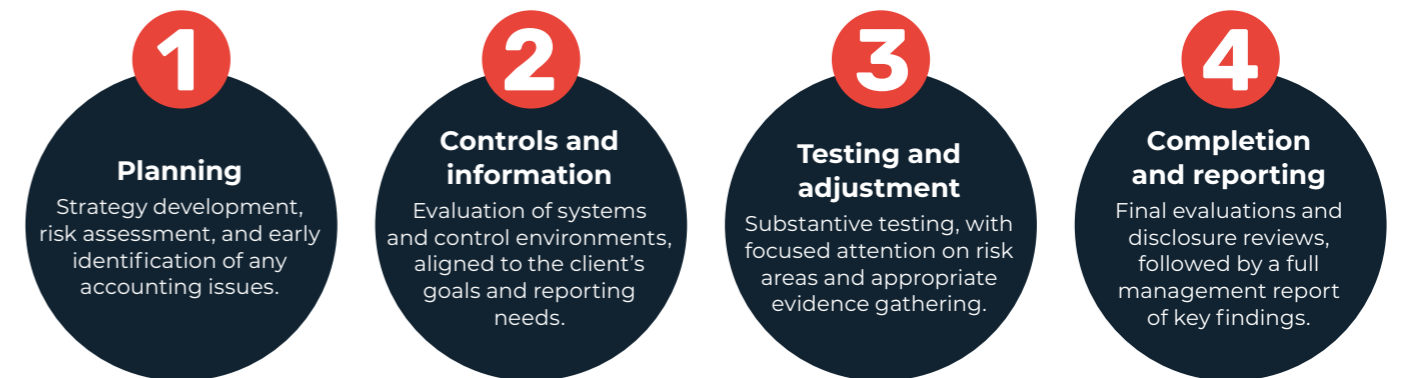
We break our audit style into six core principles:

- Quality: Flexible, high-calibre service using cloud-based software Inflo® for secure info sharing and remote collaboration.

- Openness: No surprises. We report findings in real-time and keep communication transparent.
- Understanding: Deep familiarity with the business allowed us to make relevant and practical recommendations.
- Team continuity: A Director-led approach ensured consistency and knowledge retention across the team.
- Agreed plans: Clear deliverables and timelines were set from the outset for efficiency.
- Continuous improvement: We actively sought feedback to evolve our service and remain ahead of expectations.



The audit in four stages



Charging fairly

To build a long-term relationship, we absorbed the first-year set-up costs. Our fees were:

- Based on a prepared trial balance and reconciled schedules
- Capped to RPI increases, barring major scope changes
- Exclusive of VAT and disbursements

Watt it's worth

Since that first audit, the relationship has only strengthened. The Finance Director has expressed interest in working with Fortus on further services, especially R&D tax relief.

What began as a need for audit cost savings has grown into a partnership full of potential - for both sides.

Contact us

We'd love to hear from you. Whatever your industry or business size, if you're looking to grow and are open to new possibilities, we're here with the support and expertise to help you reach your potential.

Our dedicated client services directors are ready and waiting to help you make smart strategic moves based on insight. Armed with an in-depth understanding of your business and a wealth of knowledge, we're ready to expertly guide you through today's business challenges.



0333 006 6981



enquiries@fortus.co.uk



fortus.co.uk

Our locations

York

Equinox House
Clifton Park
Shipton Road
York
YO30 5PA

Leeds

Central House
47 St Paul's Street
Leeds
LS1 2TE

Scarborough

5&6 Manor Court
Manor Garth
Scarborough
North Yorkshire
YO11 3TU

“We’d be lost without Fortus’ support. We can turn to them with any problem, and we’ll overcome it together. Fortus go over and above what’s expected.”

Director
Electrical Contractors

leading the ambitious

fortus.co.uk