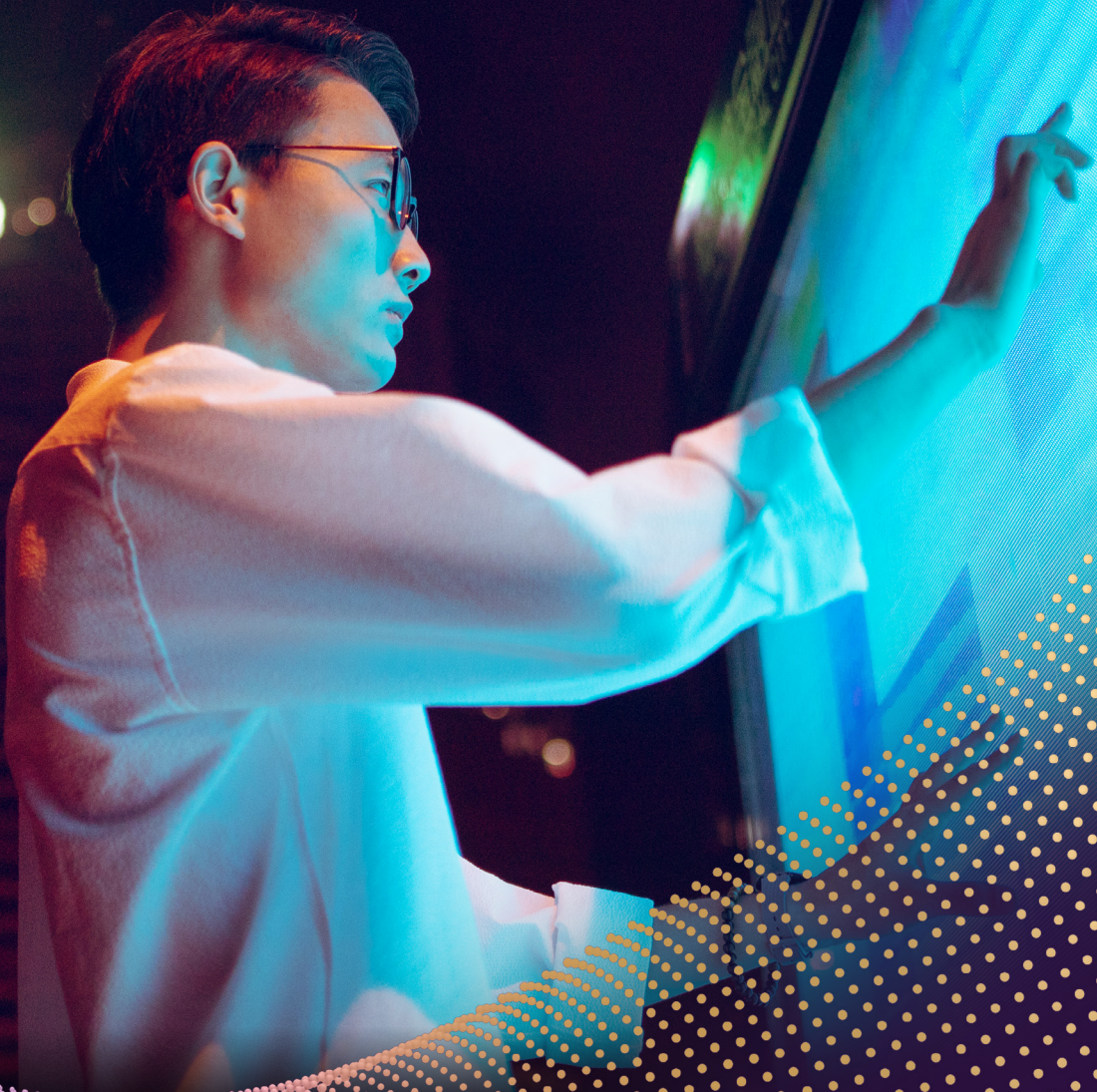


# TECHNOLOGY & TRANSFORMATION SERVICES



**evelyn**  
PARTNERS





# The power of good advice

Life is full of decisions and choices that shape our future. Making great decisions requires as much certainty as possible – the kind of certainty that comes from good advice. Our advice is backed by almost 200 years' experience in helping people and businesses flourish.

At Evelyn Partners our mission is 'to place the power of good advice into more hands'. We believe that more people and businesses should have access to good advice, regardless of their size or wealth. We are committed to raising the standards of good advice and to extending its reach.

We are the UK's leading integrated wealth management and professional services group. We look after the combined wealth and tax needs of our clients and provide specialist accountancy, assurance, tax and advisory services for businesses. Our clients range from online investors to those requiring bespoke wealth management, and from charities to entrepreneurs and corporate businesses.

All our advice is delivered by people who care, who go further to understand your needs so they can help you make those big decisions with ease and confidence, bringing *you* closer to what matters *most to you*.

That's the power of good advice.



# Welcome

Businesses are innovating and identifying more efficient ways of meeting the ever-expanding needs of today, while also tackling tomorrow's challenges. Using technology can improve the quality and accuracy of work, providing comfort and confidence in multiple processes. It also frees up individuals to focus on value work and distributes more relevant information, contributing to overall business success.

Our team helps businesses formulate technology strategies focusing on areas such as:

**Systems Optimisation** – keeping up to date with software systems is key to making sense of your business data. The right system reduces the workload and automation of activities. As a result, businesses improve effectiveness and consistency.

We assist businesses with systems reviews, gap analysis, future state requirements, platform recommendations, and vendor evaluation exercises.

**Automation** – automation technologies largely conduct processes with or without manual intervention, thus minimising errors, reducing costs and the amount of human time required.

**Analytics** – data analytics is key to understanding how your business is performing, what the future could look like and what you need to focus on to get there. With analytics-focused technology, you can present real-time reporting to make better decisions faster.



# Technology & Transformation offerings

Businesses must innovate and identify more efficient ways of meeting the ever-expanding needs of today, while also tackling tomorrow's challenges. Through the use of technology and process change, tax and finance teams can focus on high value work and distribute more relevant information, contributing to overall business success.



## Making Tax Digital (MTD)

Evelyn Partners can provide cost effective solutions to future proof your regulatory compliance processes:

- Automated MTD readiness assessment
- Compliance software implementation
- Automation of quarterly reporting requirements in line with changing legislation

### Case studies:

- Bespoke Solution for VAT Partial Exemption for a property and construction company
- Tax compliance software implementations

## Risk assessment and IT Due Diligence

We can undertake IT Due Diligence exercises as part of wider projects covering:

- Systems healthcheck/process review
- R&D interviews
- Assisting with investor exercises or IPOs
- Tax risk analysis



### Case studies:

- Web Survey Tool – Evelyn Partners/CCO, IR35 & Tax DD
- IT DD projects for clients looking to IPO
- Systems evaluation for audit reports



## Process automation

Evelyn Partners can advise on, implement and host automated processes through the use of robotics and data analytics tools. The tools at our disposal help improve accuracy, assist with resource transition and will reduce the time taken for repetitive and time consuming tasks:

- Reconciliations e.g. (bank, ledgers, provisions, etc.)
- Data transfer between systems
- Email processing and distribution
- Automated data entry through spreadsheets and other electronic documents

### Case studies:

- Debtors Control Automation for national farming client
- Payroll automation project
- Document recognition/invoice processing
- Supplier Statement Automation for landed estates company
- Conversion of reward programme/customer sign up from manual to electronic resulting in 1 FTE p/a saving
- Filing CT600 Returns for a land management company

## Data analytics, predictive and visual reporting

Deliver data analytics and management information solutions to generate insight, drive efficiency and improve controls:

- Standardised transactional level testing
- Predictive analytics and machine learning capabilities
- Dashboard-based trend analysis
- Automated data transformation
- Portfolio analysis and insight analytics
- Understanding your compliance position



### Case studies:

- 1.5 million lines of FATCA/CRS data analysed and reported in 3 weeks
- 15 second Alteryx data remediation
- Furlough Claim Automation – 54 spreadsheets compiled
- Property Management Dashboards – Rental/Arrears Analysis
- Complete VAT return process in 20 seconds
- Use of Alteryx within R&D to improve analysis of data









## Finance and tax systems configuration

Our team have experience in dealing with finance and accounting platforms from many providers. We are able to assess your needs and configure ERP systems to deal with your business requirements:

- Tax code determination for AP and AR invoices
- Identify tax liability and recoverability before contracts are agreed by procurement
- Expose potentially hidden foreign taxes
- Other tax treatment determination
- Chart of accounts sensitisation

### Case studies:

- Private Client Dashboards available for over 5,000 individuals
- Automated Online Filing of personal tax returns

## Systems review and technology advisory services

With our ability to perform full end-to-end process and systems evaluations, we are able to identify process bottlenecks, failures in system configuration and deliver enhancements that can transform and improve the way businesses run:

- Current State Assessment and gap analysis exercises
- Vendor evaluation projects and process automation opportunities
- Platform implementation and configuration
- Full project management services



### Case studies:

- Multiple clients, multiple proposals, transformation and IT DD
- OTP, HCM, RPA, stock management, SAP, and more

## Speak to an expert



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