

## Assisting the family lawyer

The Price Bailey forensic team are able to assist in the financial aspects of shareholder dispute, divorce and separation

#### Valuations in Divorce

**Simon Blake** leads a team that regularly advises on the valuation of businesses for couples going through the divorce process.

We can help in some of the following ways

Single joint expert (SJE) or expert court reports prepared with fees starting at £6,500 plus VAT for a single company valuation

As an alternative where appropriate, advisory reports or jointly instructed advisory valuation reports are available



Ability to act as a 'shadow' expert

**CGT** calculations to assist the parties or a formal SJE report prepared on the tax consequences of the transfer of shares, property and other assets

Calculation of future maintainable income from the family business and liquidity

Advise on the most tax efficient way to divide up the family assets





#### Case Studies

Date: October 2021

**Sector:** Property

**Role:** Report to the

Court on the

valuation of >100 buy to let residential

property portfolio

investment

businesses including

tax consequences of

a disposal of shares



Date: June 2020

**Sector:** Waste & Renewables

Role:

Valuation of a recycling group including tax consequences of a disposal of inform a report for divorce

Date: April 2022

**Sector:** Food & Beverage

**Role:** Preparation of a

Court report for the valuation of a

business operating niche beverage

outlets across the UK





**Role:** Valuation of a

Lincolnshire flower growing business including its liquidity,

remuneration
produced and tax
consequences of sale
for divorce purposes



Date: January 2022Sector: Horticulture

**Role:** Valuation for the

Court of a

Lincolnshire business owning agricultural

farmland and investment properties







# Assisting in the financial aspects of the divorce process...

We are able to assist with drafting financial questions and enquiries arising from disclosure of the parties' Form 'E' Give a 'without obligation' review of the accounts or financial data to see if any forensic or further work would be beneficial

Provide an independent critique of the businesses' own accountant's valuation to ascertain whether a joint expert report would be advisable

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2



### Price Bailey People



**Simon Blake** Strategic Corporate Finance Partner

Simon is a specialist adviser for owner managed business, advising on the lifecycle of a client's business from a corporate finance and M&A (mergers and acquisitions) perspective. This will include assessing, identifying and sourcing funding requirements, whether for organic growth, acquisition or re-financing; business valuation for both M&A activity, dispute resolution, tax purposes (share schemes, probate, restructuring); investigative services, including due diligence and forensic work.



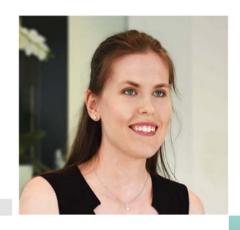
Stephen Reed
Strategic Corporate Finance
Partner

Stephen has specialised in corporate finance since 1999 and holds the Institute's Advanced Diploma in Corporate Finance. Based in our Norwich office, but working across Price Bailey's entire region as part of an 19 strong team, he offers lead advisory services to owner managed businesses across the full spectrum of strategic and corporate finance services including business disposals, mergers and acquisitions, buy-outs, due diligence reporting, valuations, private equity fundraising, debt funding and refinancing assignments.



Denise Cullum Forensic Senior Manager

Denise is a senior manager in charge of the forensic accounting services offered by experts throughout the practice. Assignments, accepted on behalf of the claimant, defendant or in a joint capacity, include personal injury claims, commercial disputes, family matters, professional negligence and criminal cases. Fully conversant with the Civil Procedure rules and the duties of experts, Denise is a member of the Expert Witness Institute and an associate member of Resolution.



**Eleanor Lothian** Strategic Corporate Finance Manager

Eleanor specialises in company valuations and forensic accounting.

Eleanor has prepared company valuations for a variety of purposes including company sales and share issues, MBOs and EOTs, and probate and matrimonial proceedings. Eleanor's forensic accounting work involves assisting with the preparation of advisory and expert witness reports on matters such as company valuations, determination of losses, and breaches of contract.