

Building for growth

itm
Solution delivered...

Independent Transition Management Limited (ITM) is a major service provider to the UK financial services industry, supplying specialist data management systems and support services to pension providers and other financial institutions.

ITM has been focusing on a growth strategy over the last five years, and has had significant success, having doubled its turnover from £6m in 2011 to £12m in 2017. They attribute much of this growth to their relentless focus on customer service, putting customers at the heart of their business and ensuring their processes are geared towards high quality relationship management.

We have been working with ITM since 2013, when they first engaged us as auditors and

corporate tax advisers. Over the last five years as they implemented their strategic vision, we have worked closely with them, not only on the audit and tax side but also helping to support their growth programme.

One of their main long term goals is capital growth. We collaborated with ITM to identify ways in which they can influence the value of their business. The recommendations were then presented to the senior management team who are now using these levers to drive their decision making.

Having the right people in place is strategically important to ITM as a service provider, ensuring they all are focused on helping to deliver the company's long term goals. We have been advising and providing administrative services in relation to the company's EMI scheme. With the EMI in place the company has been able to provide additional benefits to senior staff members which has improved retention and aligned their interest to that of the shareholders.

ITM pride themselves on the quality of their systems and internal controls – over the last three years we have supported them in the completion of the ICAEW – accredited AAF 01/06 assurance report. The report demonstrates the standards to which ITM adhere for client service delivery, and provides information and assurance to clients and their auditors with regards to the control environment within which ITM operates.

“Over the last five years, we have worked together with Roffe Swayne on a number of areas. The team are highly responsive, have strong technical expertise and provide great support, and we look forward to continued collaboration in the future”
Gurmit Dhesi, finance director of ITM



For more information

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