



A Smooth Transition from
DAY-TO-DAY MANAGEMENT TO A MORE HANDS-OFF ROLE

ALAN WINTERSGILL IS ONE OF THE MOST RECOGNIZED

and respected names in business in Bradford. Both for his work at Naylor Wintersgill with leading businesses across the UK, and also for the many community and educational organizations Alan gives his time and expertise to. In 2014, Alan was awarded the British Empire Medal in the Queen's Birthday Honors List for services to charity and the community of Bingley, where he lives.

ALAN QUALIFIED

WITH ISLES VERITY

in 1974 and moved to PwC in Leeds before spending 9 years in senior finance roles in the manufacturing sector. In 1986, he turned down an attractive Group FD role in favor of establishing Wintersgill & Co. to fill a gap in the accountancy market.

He was soon busy with clients, non-executive work and advising investors and, in 1992, merged with Milnes Naylor to acquire Isles Verity, creating Naylor Wintersgill.

The business continued to develop and grow and further acquisitions have followed to reach 54 staff in 2016. Alan continues to advise in all areas of corporate finance, including company sales and acquisitions, sourcing investment and advising owner managed businesses.

In 2010, Alan attended one of TAB's "Taster Boards" and was so impressed with the people around the table and the issues discussed that he joined. Six years on, Alan remains an active member of his TAB Board Meeting monthly in and around Bradford and Ilkley.

During the last 6 years, Alan has been supported by his TAB Board and Facilitator/Coach to make a remarkably successful transition from day-to-day management to a more strategic role as Chairman.

Transitions of this kind are never straight forward and establishing enough confidence to change his role in "his baby" took time and fresh perspectives including an influential mix of support and challenge from his TAB Board.

"My TAB Board and one-to-ones have been extremely helpful in our achieving such a successful transition after building the business over decades."

This successful transition has allowed Alan to steer the company through what is often a turbulent and traumatic time for businesses as the founder steps into a more strategic role. Yet, as is often the case, Alan's contribution to the firm has increased and not diminished as a result of this process.

"I have taken over the day-to-day running of the business and have particularly valued Alan's support. Together, we have managed the succession of the firm, capitalizing on the solid foundations Alan and the team have developed over the years," says Vicky Wainwright, Managing Partner. "The new structure allows me to implement our growth strategy and Alan to take a more strategic role overall."



With the change of role, Alan has been able to increase his family time, establish regular exercise and maintain time spent on his many honorary, charity and fundraising activities. In addition, Alan's financial, business development and strategic input to the company has been re-energized.

Alan is very proud of the number of partners who trained and qualified at Naylor Wintersgill and now play crucial roles in the executive and strategic teams.

And, as a result of this long-term succession planning, the firm is doing better than ever under Vicky – who was the first Naylor Wintersgill trainee to qualify as a chartered accountant in 1999.

"To anyone thinking about TAB I would say: Do it - No shadow of a doubt!"