Jayesh P. Patel MBA FInstSMM JP
rwprogressive.co.uk

FOR ACCOUNTANTS · NED / CHAIR

When accountants should appoint a NED

Partners are asked for “someone who can sit on the board” when a client is scaling, selling, raising, succeeding a founder, or cleaning up finance. This page is what you can attach to that email.

WHEN A NED IS THE RIGHT PRODUCT

A structural event is coming: succession or retirement, sale, PE / VC or other investment, refinance, acquisition, merger or a serious restructure. The numbers are no longer safe to take on trust — late packs, a weak FD, cash surprises, HMRC or bank tension, or a board that only hears good news. The owner is still the operating system. The firm wants a repeatable advisory offer (a NED seat with a defined cadence) rather than open-ended consultancy days.

Do not appoint a NED to write the marketing plan, run payroll, or replace the CEO. That is an executive hire or a project. Jayesh will say so.

WHAT IS IN IT FOR THE ADVISER

A growing client, therefore higher fees. More room for corporate finance, commercial finance, virtual FD work, management accounts and genuine advisory. A higher-value relationship. Jayesh will not bid against you for compliance, tax, audit or the transaction. You remain the adviser of record. Introduce by email and stay on the thread.

THE FIRST 90 DAYS

Typical cadence is about 24 days a year; the first quarter is denser. Days 1–30: listen with documents, plus one conversation with you so the relationship is not cut across. Days 30–60: a short KPI set the board can see between meetings; reserved matters; risks that would embarrass everyone in diligence. Days 60–90: a proper board meeting. If the brief is PE-prep, sale or succession, the output is a board that can stand a buyer’s questions — not a strategy slide deck.

BEST-FIT INTRODUCTIONS

Owner-managed and mid-market businesses in reach of Bolton (or remote): construction, services, specialist trades, agencies, media and technology — and any client approaching capital, succession or a finance-function problem. Titles taken: Non-Executive Director, Non-Executive Chair, Board Advisor.

Enquire about a board seat

Jayesh P. Patel · Non-Executive Chair · Strategic Board Advisor · IPO in 5
j.patel@rwprogressive.co.uk · 07771 871 757 · linkedin.com/in/jayesh-patel-ned

Confidential when attached to an introduction · Personal service