Career paths

Leeds advisory

Building a network – and Cortus Advisory's reputation in Yorkshire – is what drives transaction services associate director **Felicity Roberts**

What attracted you to chartered accountancy?
When I was 15, I did a week's work experience with a family friend in London. He took me under his wing, and shared his experiences about working for the Big Four and going through his exams. When I was choosing my A-level options, my business studies teacher, Mr Sleight, said he was introducing a new course – accounting. He was a great teacher. I absolutely loved the course and went on to study accounting at the University of Sheffield. As part of my degree, I did a year's internship with Grant Thornton in Sheffield, and when I completed my degree in 2018 I started a training contract with them.

Why move to transaction services?
The entrepreneurial side of me loves learning about what drives businesses. I'm nosey and like finding out the plans business owners have - whether that's international growth or to sell up and sail off into the sunset. My friends and family mock me, as I'll always find the business leader in the room and quiz them on what they have on the horizon. Moving into transactional services felt like a natural next step for me. Whilst I loved the technical side of my audit work, I wanted something more commercial and to be involved in the most exciting milestones businesses go through. Grant Thornton gave me that chance.

What drew you to Cortus Advisory?
I had moved to Grant Thornton in Leeds by the time I met Cortus CEO Nicky Merritt for a coffee. I was fascinated by how quickly the business had grown, and there was a fantastic opportunity to join them in Leeds. I relished the challenge of working for a growing business, in a fast-paced environment, building the Cortus brand in the local area. Cortus has a great culture with shared values – everyone is encouraging and supportive – promoting personal development and progression. Our clients are a wide variety of businesses. From supporting owners through their first investment, to working alongside investment bankers, private equity houses and lawyers, through to majority buy-outs, I find it all very interesting.

Which deals stood out early on in your career?
Every deal is different with its own challenges and learning experiences. One early deal at Grant Thornton was Hippo Digital's acquisition of Data Shed, which involved a range of local advisers. The process took some time, but I learned so many new skills. I quickly learned to use their internal systems, as well as the data visualization software they use – Power BI – so that I could present the findings to everyone involved in the deal. It was a great responsibility early in my career, and helped me build relationships. Both Hippo and Data Shed were happy. The deal was a success and the business has grown internationally.

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What is your current role?
I was promoted to associate director this year. I take the lead in the day-to-day project work, being the primary contact for the client, and assist in tailoring the scope to meet clients' needs. I work directly alongside board members, entrepreneurs and investors, advising them directly on how to make the next step. I am also responsible for team development, identifying members of the team's personal performance goals and gaps in experience. I help create a supportive environment, which encourages the team alongside me to take on new tasks and deliver quality outputs. I am always seeking potential opportunities for Cortus at local networking events, actively strengthening relationships with local advisers and investors.

What deals have you worked on recently?
We recently had a buy-side engagement for Cornerstone on its acquisition of ONE Creative Environments. Cornerstone and ONE were very much aligned on strategy and the synergy opportunities for the combined businesses. The process was really efficient, and the deal completed within just a few months.

And what are your future ambitions?
I want continuous improvement in what I do to help people and their businesses. I want to keep expanding my network, so I can offer the wider services our firm has to offer in a deal process. And I'd like to be able to see a team I have helped build, and be a highly valued member of the local deal community.