

Case Study

Kirsty Wilson

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1. How many years have you personally been working on corporate finance cases?

A. I've worked in Corporate Finance for 19 years. I trained in audit but always knew that that wasn't going to be the specialism for me. After a six month secondment in the corporate finance team, I have remained in CF ever since.

2. What makes this work so interesting for you?

A. Three things I love about what I do:
1. The variety - No two deals are the same. In fact, no two days are ever the same. I love the unpredictability and the constant challenge of having to adapt.

2. The clients - Acting in an SME advisory role you get to work for so many different clients with businesses across so many different industries. Helping clients to realise their aims is possibly the most rewarding part of the job.

3. The people - I get to work with some amazing people on transactions - whether colleagues or other advisors - and I learn so much from working alongside or opposite other professionals.

3. Explain a recent case which had challenges which you were able to overcome.

A. We advised Forbes & Lomax Limited on their sale to an MBO team. Although a MBO deal was not initially planned, after we had met with all major stakeholders to understand their desired outcome, we presented the MBO which become

favourable to all parties. The deal required navigating complexities like US subsidiary ownership, property extraction, and financing. Despite these challenges, we structured a successful deal ensuring growth potential and favourable tax treatment for the vendors, which completed in April 2023.

4. How do you find having access to quality research including company and deals data helps you in your work?

A. Being a small CF team it is essential for us that we have the support of Kirsty at The CFN. Knowing they provide additional resources to us ensures we can pitch for work confidently, knowing we will be able to meet client expectations even in busy periods.

5. What do you value from your membership of The Corporate Finance Network?

A. Being a part of The CFN provides us with a valuable network of like-minded CF advisors. We share ideas, experiences, thoughts on best practice and generally offer support to one another. On top of that, the training and resources provided by Kirsty and The CFN are essential to us. Not only do we have access to helpful tools to assist us in supporting our clients, but Kirsty constantly challenges us to ensure we are offering the best service to our clients and that we are able to proactively seek out new opportunities.