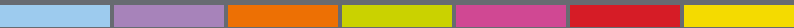


Working at  
David Allen





Great vision without great people is irrelevant, and our people really are the best. The best at what they do and the best at how they do it.

And the great thing is, they keep striving to be even better! Our people, their skills and ambitions are as important to us as are our clients. We can't deliver a great service without great people after all...

We offer a service that not many businesses do, we provide seven integrated services under one roof. Our aim is to be the best provider of each of our services in Cumbria, South West Scotland and further afield.

With the right people, a clear direction and happy clients we can achieve our aim.

## Welcome to David Allen

Our little book of values will help you to understand...

- Who we are
- What we do
- What makes us different to other firms
- How we treat each other and our clients

**David Allen**  
Founding Partner



## Who we are

We are a leading independent firm of Chartered Accountants, Advisers and Specialists that deliver a wide range of business services to businesses of all sizes.

We are a partner led firm, with partners in each of our service areas to make sure each area is represented in everything that we do.

We offer integrated services based in Cumbria and South West Scotland with offices at Carlisle, Dalston, Dumfries, Penrith and Workington.



Carlisle



Dalston



Dumfries



Penrith



Workington

If when reading our little book of values, you would like to know more about who we are, our aim and our people you can contact me directly.

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**David Allen**

Founding Partner



## David Allen

I love work, I love the brand, I love everything about the company and our people.

Back in 1997, I had a vision to deliver a great service and offer much more when it came to the services available.

I qualified as a Chartered Accountant in 1995 and gained my practising certificate on Monday 24 March 1997. That same day I started David Allen Chartered Accountants from my garage in Dalston.

I'm very proud of the way the business has evolved from being a Chartered Accountants to now having a multi-discipline service offering, from IT to debt recovery. I'm also very proud of the team we have nurtured, with many having studied for new qualifications and grown along with us over the years.



## Alison Welton

I joined the David Allen team in 2004 and I have never looked back! There were only 25 members of staff when I joined #TeamDA, so I have seen amazing growth, development and opportunities for the team working across the David Allen group.

When looking for a practice to join, I had heard amazing things about David Allen. After reading their story, I knew they were the firm that I wanted to work for. It was a forward thinking and innovative practice which put people development and opportunities at the heart of everything it did.

My greatest professional achievement was in 2008, I became the first appointed Partner in the practice and I have since been promoted to Managing Partner. It is a real honour to play an active part in the strategy and development of the firm and to work with a great team of colleagues and clients.

## Our Service Areas



Forward thinking and ambitious accountants, auditors and advisers



Minimising the amount you pay while keeping you compliant



Independent Financial Advisers giving the advice you need to secure the future you deserve



Growing our rural economy together



IT expertise to enable your business and empower your team



Simple and effective debt recovery to help businesses and individuals



Managing complex legislation and processes to save you time

## Our Values

As a people focused business we are enthusiastic and supportive, open, honest and appreciate and treat everyone with fairness, consideration and respect.



Thrive on our clients **Ambition** for their future, and ours too



Provide the highest level of **Professionalism** with every interaction and delivery of service



Continually develop and grow our **Knowledge** and share it with others



Have **Integrity** across all interactions with clients, colleagues and our community



**Respect** and support others, and the knowledge and opinions they bring

## Our Purpose

The growth and development of our thriving business, operating with integrity for the benefit of our people and clients. To create an environment where hard work and energy prosper and creates wealth and worth for all.

“Strive not to be a success, but rather to be of value.”



## What Makes Us Different

- We are a team of highly motivated, passionate and caring people
- Our people have access to the latest technology and technical updates
- We provide fully integrated services in one firm that is available locally
- Our people create strong and friendly working relationships with all of our clients
- We are a forward thinking, straight talking, down to earth modern firm

## Our Culture

We are achievers working hard in a friendly, professional way where everyone matters. We are practical, proactive and dynamic, working with passion in all that we do.



## Our People



**David Allen**  
Partner



**Alison Welton**  
Partner



**Lucy Metcalf**  
Partner



**Michael Peile**  
Partner



**Sue Jeffrey**  
Partner



**Julie Osborn**  
Partner



**David Arnold**  
IT Director



**Gary Martin**  
IT Director



**Steve Balmer**  
Managing Director  
and IFA

## Great Place to Work

We provide great places of work and we make our work satisfying and enjoyable.

Here are some quotes from our people:

“David Allen provides all people the opportunity to develop and progress into the career that you wish to achieve. It is also a fun place to work and there is a great team spirit within the firm.”

“David Allen provide all of their staff with the opportunity to develop and progress their career. I think it is important that an employer sees the full potential in all of their staff.”

“There are huge opportunities to progress within David Allen, qualifications are not the only thing we look for when recruiting new people, experience goes a long way!”

“We reward our people for the work that they do which creates great job satisfaction.”

## Business Excellence

Our people seek continuous improvement in their areas of responsibility enabling them to make a real and lasting contribution to the aims of our business and that of our clients. We set ourselves challenging targets for business growth.

## Client Experience

Our clients are treated with respect and we develop trust and respect in return. Our clients experience an amazing service and have peace of mind knowing that their affairs are in good hands.



## Caring for Our Community

We are an integral part of our community and encourage involvement with local charities and community projects.

We strive to protect our environment.

“The greatness of a community is most accurately measured by the compassionate actions of its members.”

## Join #TeamDA

Do you share our desire to delight clients and build relationships with them?

Release your potential as part of a strong supportive team. We have a strong coaching culture, experienced, friendly, approachable partners to work alongside.

We welcome recruits at all levels.

“We are not a team because we work together. We are a team because we respect, trust and care for each other.”





# David Allen

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mail@david-allen.co.uk • david-allen.co.uk



Carlisle | Dalston | Dumfries | Penrith | Workington

*This document is for general guidance not representation or advice*