

2020 Tax Mentors

2020 Tax Mentors are partners themselves in their own accountancy practices (all of whom are 2020 Members) and have undertaken Tax Planning Strategies both for their own firms and also for their clients.



Stuart Kellner
2020 Tax Mentor

Dufton Kellner Chartered Accountants

Stuart is Managing Director of Dufton Kellner Chartered Accountants based in Heswall, Wirral. Despondent with the route that lay ahead after obtaining partnership at 27, Stuart attended Boot Camp in June 1999, and holds this responsible for keeping him in accountancy. Stuart gradually began to systemise the practice and to introduce new service lines including consulting and tax planning.

Tax planning work took off around three years ago when Stuart met David Gill from Peak Performance. The firm was fortunate to achieve instant success with the Excalibur income tax product, with 27 clients and prospects undertaking a strategy within the first few months. To date, more than 75 clients have undertaken a planning strategy, either sheltering from income tax, corporation tax or both. The sums saved are significant and this work has also been highly lucrative for the firm.

Stuart is passionate about the importance of maintaining a healthy life:work balance, and works a 4-day week. He hardly ever gets involved in routine client work, and is keen to use the spare time created within his practice to help other accountants through his role as a Peak Performance Mentor to the 2020 Group.



Phillip Dann
2020 Tax Mentor

Dean Statham LLP, Chartered Accountants

Phill Dann is a partner with Dean Statham LLP Chartered Accountants in Newcastle-under-Lyme, North Staffordshire. Phill became an equity partner in 1990 at the age of 26, and during that time has overseen significant changes to the shape of the business.

Phill has been a key driver in taking the Group to a turnover of over £2m and a team of over 35, to include business recovery & insolvency services and also financial services. Client service and innovative products are the key focus. As an enthusiastic 2020 Group member, Phill is a regular attendee at Upstream Academy Focus Group sessions, as well as facilitating break-away sessions at the 2020 Members Day Out.

He has presented extensively on tax solutions and as well as leading many clients through formal strategies, he has also undertaken a number of the strategies himself. A particular specialism is Peak Performance Contracts & Phill is looking forward to bringing both technical expertise as well as great enthusiasm to the Tax Mentor role within the 2020 Group network.



Adam Peake
2020 Tax Mentor
Peake & Co

Adam is the Principal of Peake and Company Accountants & Tax Advisors and of iTax Consulting, a specialist provider of structured tax solutions. Having established Peake and Company in 1991, Adam identified an opportunity amongst the firm's network of clients and connections to explore, research and implement structured tax planning for them. This led to the formation of iTax Consulting in 2005. Since then, iTax has grown quickly, developing a reputation for the professional provision of Income Tax and SDLT planning opportunities in particular. Revenues to iTax Consulting have, on average, been four times those of Peake and Company and the businesses have recruited strongly in recent months to cope with the practices rapid growth.

Adam is particularly strong at educating both clients and connections in the implementation of structured tax products, which combined with his firm's success in the sector, make him well qualified to mentor other accountants.



Alastair Russell
2020 Tax Mentor
Russell & Russell

After qualifying Alastair spent 2 years working for Deloitte's in Bermuda where he was in charge of the group accounting for a \$300m family owned business.

Since returning to Scotland in 1989 he has concentrated on developing his skills on advising owner managed businesses, as a Partner in Russell & Russell. Over the last 6 years this has become particularly focussed on helping people to improve the profitability and growth of their businesses. Alastair is passionate about helping owner managed businesses to achieve their potential. He is also a non executive director of Tullibardine Limited which is a malt whisky distillery and retail centre based in Blackford, Perthshire.

Alastair has not only undertaken a number of tax strategies himself but he also regularly advises his clients on the implementation of tax strategies.

Alastair is a "has been" golfer (although some would say he "never was"). His sole ambition left in golf is to start beating his brother again after a gap of about 20 years.



Ian Oliva
2020 Tax Mentor
Glen Drummond Ltd

Ian acquired a £20,000 turnover practice (that was a lot of money in those days!) in Livingston, West Lothian at the tender age of 27 and quickly built this into a sizeable, shambolic practice in which he worked very long hours for very little reward.

This all changed after Ian saw the light at boot camp in the mid 90's and then started to implement the various ideas and systems to develop his own business and those of his clients - a process of continuous improvement which he believes must never stop.

Ian was persuaded to merge with a national firm in 1999 and become managing partner of their Edinburgh office. Although he rates this as a fantastic learning experience, he quickly realised that their philosophy was too traditional and not compatible with his new skills and outlook, so he left in 2001 to re-establish the independent firm of Glen Drummond Ltd. This now has fee income of more than 700,000 guineas (they aren't decimalised yet in West Lothian) generated by Ian and his team of eight which he thinks is "not bad" for a sole practitioner in a relatively poor part of the country.

Since meeting David Gill just over four years ago, Ian's practice income and profits have been augmented by the lucrative fees generated from the many tax strategies that have been completed by clients - to such an extent that Ian has been able to complete several income tax and corporation tax strategies himself. "If I can do it, anyone can!"