



taxmarque

Tax Compliance and Advice



Tax Services Factsheet

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Self Assessment Tax Returns

Personal Tax Return Service

This service is very much designed for High Net Worth Individuals and their families, whether retired or still in employment. On the compliance side it involves completing annual self-assessment tax returns, advising regarding tax payments or repayments, e-filing documentation with HM Revenue & Customs (HMRC), and handling all related correspondence.

The service also incorporates advice on the potential for reducing an individual's income and capital gains tax burden by making full use of allowances and other tax reliefs, as well as the overall liability for couples and families by looking at the opportunities for equalising income and capital assets.

Services for Key Executives and Senior Managers

In addition to our personal tax offering, we also offer a service tailored to the needs of company executives and senior management. This service involves engaging with employers to handle the tax affairs of their most senior members of staff. It covers the completion of annual self-assessment returns, advice regarding tax payments or repayments, e-filing the documentation with HM Revenue & Customs and handling all related correspondence. This service will give the employer the peace of mind of knowing that the tax affairs of its senior people are up to date and being handled in a uniform and efficient manner.

The engagement would be with the company on the basis that they will settle fees as agreed prior to commencement. This being the case, the amount paid per individual will be regarded as a benefit in kind and incorporated within each Form P11D.

Flexible Benefit Scheme

If your company runs a flexible benefit scheme for staff then it can incorporate a personal tax return completion service as an additional offering. This will give employees the opportunity of having their annual self-assessment tax return completed for an agreed fee at a discounted rate negotiated by the company. In addition to completion of the return, the fee would also cover advice regarding tax overpayments or underpayments and the e-filing of the documentation with HM Revenue & Customs.

For further details regarding these services please contact Donald Histed on 0141 573 5389 or email him at donald.histed@taxmarque.co.uk