Private Client Tax

The complexities of the UK tax system impact on more and more people and the Self Assessment system has shifted the compliance burden to the taxpayer, who has a duty to self-assess correctly. Whiting & Partners' Private Client Team can relieve that headache and ensure that you take advantage of all appropriate reliefs and exemptions – including those you don't even know about.

Accounting for your Success

www.whitingandpartners.co.uk

WHITING & PARTNERS
Chartered Accountants & Business Advisers

Whiting & Partners Private Client Tax

- *Compliance*
- *Advice & Planning*

'Our experienced staff get to know our clients and react to their specific needs. Our client base ranges from high net worth individuals with numerous investments and income sources, non-UK domiciliaries, overseas residents, employees and directors with share scheme packages, high earning executives, Lloyds Underwriters and those with significant property portfolios, to those who simply let one property or have a number of pensions and bank accounts.'

Compliance

We offer high quality compliance and advisory services to private clients, covering all aspects of Income Tax, Capital Gains Tax and Inheritance Tax.

We are proactive in seeking ways to mitigate exposure to all these taxes and careful not to save one tax at the expense of another.

We also provide a comprehensive service to Trustees, covering the preparation of Trust Accounts, preparation of Trust Tax Returns and Inheritance Tax Accounts and calculating trustee liabilities.

Our specialist financial services division, Whiting & Partners Wealth Management, works closely with us for the benefit of those clients who require specific savings, investments and pensions advice.

The Private Client Team operates alongside other service sectors within the firm. If you have a business but also require specialist personal taxation advice, we can accommodate all your needs.

Our standard services cover:

- Completion of Self Assessment Tax Returns
- Calculation of income tax and capital gains tax liabilities and notifying due dates for payment
- Preparation of rental income accounts
- Preparation of capital gains calculations for disposals of shares, land & property and other assets.
- Completion of Inheritance Tax Accounts and calculations

Advice & Planning

We offer tax planning advice to minimise your exposure to the full range of UK taxes. Our standard year-end review will ensure that you make full use of your reliefs and exemptions and we can offer advice on how best to structure your Will to save Inheritance Tax and advance gifts during your lifetime without losing control.

We also offer Fee Protection Insurance. If you attract the attention of HM Revenue & Customs, our fees for dealing with their enquiries are insured.

More than anything, we take the strain. We care about our clients.

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