

Affix postage

Jonathan J Crowther FCA
Crowthers Chartered Accountants
The Courtyard
19 High Street
Persnore
Worcestershire
WR10 1AA

Directors

Jonathan J Crowther FCA
Richard F Beard FCA
Nikki L Walding ACA CTA
Ian P Cooke FCCA ACA

Managers

Sophie J Howard ACA
Sandy E Lewis
Sarah L Smith ACCA (Affiliate)
Steven M Carter ACCA
Kelly J Cummings ACCA

For personal tax queries please contact:
Jonathan J Crowther FCA - Persnore
or Sandy E Lewis - Ledbury

Persnore Office

The Courtyard
19 High Street
Persnore
Worcestershire WR10 1AA
Tel: 01386 552644
Fax: 01386 553098
Email: tax@crowther.co.uk

Ledbury Office

10 The Southend
Ledbury
Herefordshire HR8 2EY
Tel: 01531 631500
Fax: 01531 631323
Email: tax@crowther.co.uk

For more information please visit our website
www.crowther.co.uk



Crowthers Accountants Limited is registered to carry on audit work and regulated for a range of investment business activities by the Institute of Chartered Accountants in England and Wales

Personal Tax Services to our Private Clients



Our Private Client Service

Our personal tax services to Private Clients ensure you have the peace of mind that your tax affairs are dealt with absolutely correctly and at the same time you will know in advance what this will cost.

With our Private Client Service we will:

- Provide a checklist of information needed to prepare your Return.
- Process your Tax Return on our HM Revenue & Customs approved computer system.
- File your Tax Return electronically to minimise processing errors by HM Revenue & Customs.
- Prepare detailed tax computations and advise you of tax payments to be made.
- Include free telephone support for any Tax Return or tax payment queries you may have during the year.
- Deal with any Tax Return or tax payment enquiries raised by HM Revenue & Customs.
- Keep the records required to deal with any queries for the required 3 years.
- Email you a quarterly tax newsletter.
- Discuss any tax planning ideas that may be applicable to your circumstances.

Fees and Payment Terms

Traditionally, we issue an invoice when the Tax Return is completed for payment within 14 days.

However, most clients now prefer to receive a fixed fee quotation at the start of the tax year that is payable by an annual direct debit in July.

A guide to the level of our fixed fees is shown opposite.

Standard Fixed Fees for 2009/10

Individual quotations are provided to each client in April but the following guide fees apply to a standard Tax Return.

Individual Return - £255 inc VAT
Husband and Wife - £390 inc VAT

A 'standard' Tax Return is one with less than 5 interest figures, less than 5 dividends and no more than 3 employments or pensions.

A fixed fee is only available for Private Clients if paid by annual direct debit. The fixed fee excludes any CGT and IHT advice which will be invoiced separately based on the time taken. These specialist services are explained below.

Capital Gains Tax (CGT)

CGT is payable on the capital profits made when selling property, investments and other assets. Several reliefs are available particularly where a property has been lived in as your own home.

Our role is to help you to minimise your tax liability through advance planning and then to calculate and agree the tax liability with HM Revenue & Customs.

Inheritance Tax (IHT)

Our Inheritance Tax reviews can potentially save a huge amount of tax for your heirs. We work with your Solicitor who prepares your Will, to ensure the taxation consequences on your death are minimised for your family. We look at things like:

- Maximising the transferable nil-rate band
- Gifts in your Will and transfer between spouses
- Use of lifetime gifts from capital and excess income
- Potentially exempt transfers (PETS)
- Special reliefs for business property

Reply - Private Client Service

- I would like a Tax Return quote
- Please contact me to discuss CGT
- Please contact me to discuss IHT
- Please email me your newsletter
- Other:

Name:

Address:

Telephone:

Email:

Referred by:

Reward Scheme

We always thank our clients and contacts for referring new prospects. This is the way we have developed our business for over 21 years.

We are currently offering to pay for a meal for 2 at a local restaurant (worth up to £50) for each referral that results in us taking on a new client.

Existing clients can pass on this brochure and insert their name in the "Referred by" box above to qualify for this reward voucher.