



## Client Engagement Letter

Dear Customer,

The purpose of this letter is to set out the basis on which we will act as your tax agent and to clarify our respective areas of responsibility.

You are legally responsible for making a correct return in respect of your annual tax liability, and for paying your tax on time. As your agent, it is therefore essential that we are supplied with all of the relevant correct information to the best of your knowledge concerning your tax affairs in a reasonable good time. To facilitate this, please provide us with copies of any communications you receive from the HM Revenue and Customs, as soon as you receive them.

### **Self-Assessment Tax Returns - our responsibilities**

- We will prepare your tax returns if required, together with all supporting schedules as necessary. You will be responsible for letting us have all the information needed to prepare this form.
- We will forward your tax return forms to you for approval, these will then be submitted to the HM Revenue and Customs.
- We will deal with any correspondence received from the HM Revenue and Customs or from you as necessary except special tax investigations matters.
- We will advise you concerning recommended payments on account and final payments of your tax liability and the due dates for those payments.
- We will provide the professional services outlined in this letter with reasonable care and skill.
- However, we will not be responsible for any losses, penalties, surcharges, interest or additional tax liabilities arising from the supply by you or others of incorrect or incomplete information, or your or others failure to supply any appropriate information or your failure to act on our advice or respond promptly to communications from us or the tax authorities.
- If HM Revenue and Customs raise general enquiries relating to your tax return, we will discuss the position with you and agree with you the basis on which We will deal with such enquiries on your behalf.
- We will prepare your tax return in future years under the same conditions as above

### **Self-Assessment Tax Returns – your responsibilities**

Under the tax deadline regime there are a number of key dates by which returns and payments must be made. Failure to meet the deadlines may result in automatic penalties, surcharges and/or interest.

You are legally responsible for making correct returns providing relevant documents and for payment of tax on time. To enable us to carry out work you agree:

- To make a full disclosure to us of all sources of income, charges, allowances and capital transactions and to provide full information as necessary for dealing with your affairs; We will rely on the information and documents being true, correct and complete;
- To respond quickly and fully to our requests for information and to other communications from us;
- For Self-Assessment you must provide us with information in sufficient time for your tax return to be completed and submitted by 31st January following the end of the tax year. In order to meet this date, you agree to provide us with all relevant information as soon as practical after the end of each tax year;
- To forward to us, on receipt, copies of all PAYE coding notices, notices of assessment, letters and other communications received from the HM Revenue and Customs to enable us to deal with them as may be necessary within the statutory time limits.

## Help us to help you

We aim to provide the best possible service to our clients. If you would like to discuss how our service could be improved, please let us know by telephoning or emailing us using the details provided at the top of this letter.

We will look very carefully and promptly into any complaint and do all I reasonable can to rectify matters. Prompt communication enables us to take prompt action for your benefit.

## Fees

Our standard fees are calculated as a percentage of refund received.

18% - For refunds up to £2000

20% - For refunds exceeding £2000

£60 flat fee - Where the client already owes tax and we work to reduce this through claiming tax relief on expenses.

£200 - Where the client is **self-employed or receives income from property**. This is our charge for processing your self-assessment return.

## Instructions for cancellation

You have the right to cancel this contract within 14 days. The cancellation period will expire after 14 days from the day of the conclusion of the contract. You will need to provide us 60 days' notice of cancellation after this cool off period. To exercise the right to cancel You must inform us, of your decision to cancel this contract by a clear statement by: (a) writing to us (b) by phoning

You will not incur any fees as a result of the cancelation unless we have started the performance of services at your request during the 14 days cancellation period, you shall be required to pay us an amount on basic + our hourly rate.

## Applicable law

This engagement letter shall be governed by, and construed in accordance with English law. The courts of England shall have exclusive jurisdiction in relation to any claim, concerning the engagement letter and any matter arising from it. Each party irrevocably waives any right it may have to object to an action being brought in those courts, to claim that the action has been brought in an inconvenient forum, or to claim those courts do not have jurisdiction.

## How we Use your information

We treat all information we hold about you as private and confidential. We will not reveal any personal details or details concerning your accounts and investments to anyone not connected with us, unless: You ask us to reveal the information, or we have your permission to do so. We are required or permitted to do so by law. It is required by law enforcement, fraud prevention or credit reference agencies. There is a duty to the public to reveal the information, e.g. to other government bodies, tax authorities or regulatory bodies When you give us information about another person, you need to confirm that you have been appointed to act on behalf of that other person. This includes providing consent to process that other person's data as set out in this leaflet. We may monitor or record telephone calls for training, quality assurance and other business purposes.

**Agreement of Terms**

Once agreed, this letter will remain effective from the date of signature until it is replaced or terminated.

Please confirm your agreement to the terms set out in this letter by signing and returning the enclosed copy. If anything is unclear to you or you require any further information, please let us know.

**Client declaration**

I am in agreement with the terms and conditions set out above.

Signed .....

Print Name .....

Date .....