

# TAX SUPPORT FOR PROFESSIONALS

BDO LLP NOVEMBER 2021



IDEAS | PEOPLE | TRUST

**BDO**

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# WELCOME

## TAX SUPPORT FOR PROFESSIONALS (TSP)

- ▶ Even a professional tax adviser can't be expected to know everything all the time. It can be invaluable to have easy access to tax expertise to discuss those tax issues you can't readily resolve yourself
- ▶ TSP offers a premium service of practical advice and solutions for professionals across tax, legal and accounting
- ▶ The core TSP service includes telephone support and assistance with projects across all taxes
- ▶ Our 'Knowledge Pack', available at an additional cost, provides access to our webinars/London seminars, monthly Tax Insight magazine, and two free places at our annual conference
- ▶ In addition, our clients have access to both BDO's tax and non-tax specialist services.

## LOCAL TEAM WITH INTERNATIONAL REACH

- ▶ Our TSP team has been supporting clients for over 30 years, so you can be assured that you will work with highly skilled experts
- ▶ Our TSP team is across our national offices, providing clients with the opportunity to work with their local BDO team. We also have the added benefit of being connected to BDO's extensive international network of experts, allowing us to offer access to services beyond tax.



**MALCOLM PENGELLY**

TAX PRINCIPAL

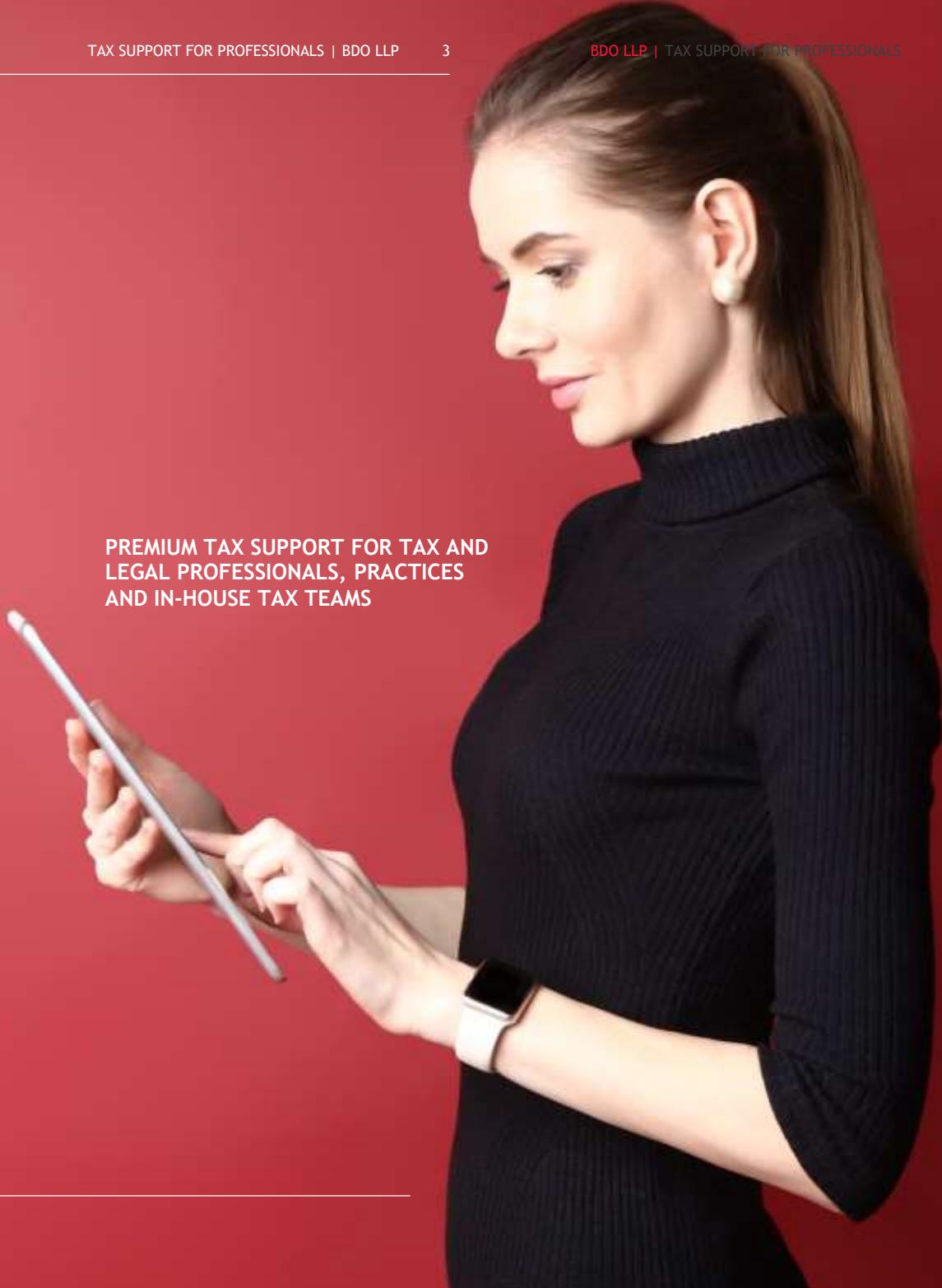
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**PREMIUM TAX SUPPORT FOR TAX AND  
LEGAL PROFESSIONALS, PRACTICES  
AND IN-HOUSE TAX TEAMS**



# OUR SUPPORT TO YOU AND YOUR CLIENTS

THE TAX CLIMATE IN THE UK IS ONE OF ALMOST CONSTANT CHANGE, AND TAX LEGISLATION CONTINUES TO GROW EVER MORE COMPLICATED.

When faced with complex queries from your clients, we can offer peace of mind as a source of expertise and second opinion. We are here to help.

## TAXLINE

0845 356 0006

Speaking to an experienced fellow professional is often the most efficient way to tap into their knowledge to confirm that you are on the right track or point you in the right direction when an area is new to you.

Our 'Taxline' service provides fast, authoritative advice at a competitive rate of £80 + VAT per 12 minutes or part thereof (plus a 2.5% service charge if not paying by direct debit).

Even if you have your own in-house tax resource, our team can provide invaluable additional support.

## PROJECTS

Many of our clients often like us to assist them when they feel they do not have the necessary experience and time or they are uncomfortable with the associated risk. We assist our clients by either working alongside them or in the background.

Projects can involve:

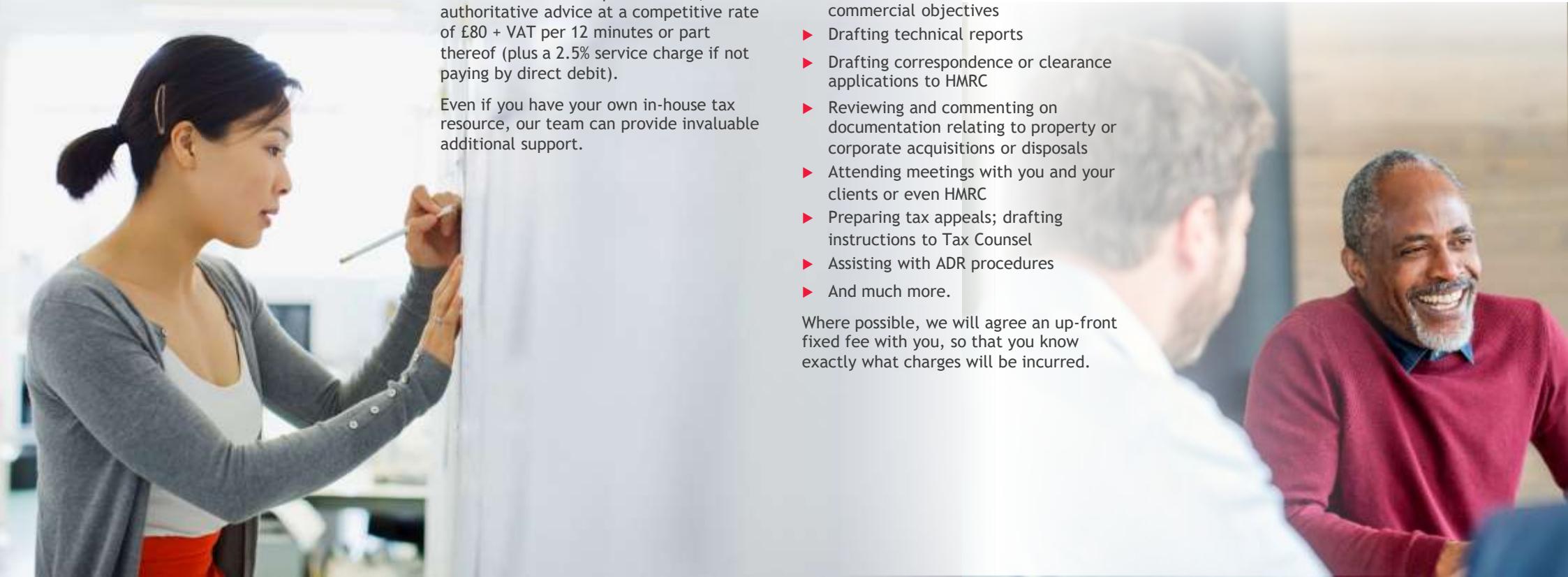
- ▶ Identifying solutions to meet your client's commercial objectives
- ▶ Drafting technical reports
- ▶ Drafting correspondence or clearance applications to HMRC
- ▶ Reviewing and commenting on documentation relating to property or corporate acquisitions or disposals
- ▶ Attending meetings with you and your clients or even HMRC
- ▶ Preparing tax appeals; drafting instructions to Tax Counsel
- ▶ Assisting with ADR procedures
- ▶ And much more.

Where possible, we will agree an up-front fixed fee with you, so that you know exactly what charges will be incurred.

## MORE FROM TSP

We are here to help and provide you with solutions to your question. We also want to help by sharing knowledge.

Our clients have access to a host of learning resources including regular emails, seminars and tax update webinars.



# WHY WORK WITH US?

## WE WILL

- ▶ Provide bespoke and practical advice, guidance and assistance, tailored to your client's specific circumstances and requirements
- ▶ Apply our experience to pre-empt issues or problems and find appropriate solutions
- ▶ Introduce our extensive team of specialists to ensure that you get the very best advice from the experts in a particular field
- ▶ Be approachable and available
- ▶ Offer you a platform to access our vast international network whilst still maintaining key relationships throughout
- ▶ Co-ordinate and manage projects cohesively and efficiently.

## EXCEPTIONAL CLIENT SERVICE

IDEAS | PEOPLE | TRUST

We believe in investing time and energy in our people and giving them the freedom to do their best work for you.

Our belief is that this will generate the insights and ideas that will make a real difference to you and your client relationship.

We are passionate about earning your trust and that of your clients. Trust allows us to deliver the best possible outcomes for you and means that you will continue to work with us.

That means:

- ▶ Making sure we take the time to understand you and your client's needs
- ▶ Being accessible and hands-on
- ▶ Staying flexible so that as your needs evolve, so does our approach to solving them
- ▶ Keeping our promises and making sure we deliver
- ▶ Asking the right questions, enabling us to foresee any potential issues or opportunities.

“ What people tell us they like about BDO TSP is that we make them look good ”

MALCOLM PENGELLY | HEAD OF TAX SUPPORT FOR PROFESSIONALS



# CORE TAXLINE TEAM

RUN FROM OUR LONDON OFFICE, OUR DEDICATED AND EXPERIENCED TAXLINE TEAM IS AVAILABLE THROUGHOUT THE WORKING DAY TO PROMPTLY RESPOND TO QUERIES. YOU CAN CONTACT THE TEAM ON 0845 356 0006, OR DIRECTLY, USING THE CONTACT DETAILS BELOW.



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Malcolm has over 30 years experience advising family owned businesses in all aspects of UK direct tax, with particular experience of property businesses. He regularly advises on stamp taxes and SDLT issues, including property structuring, planning and share adjudications, and has advised family owned businesses regarding business reorganisations, acquisitions and sales and their tax efficient structuring. He lectures regularly on tax issues on internal BDO courses and externally.



**JEFFREY WEBBER**

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Jeff is a director in the Tax Support for Professionals (TSP) team, providing advice to our accountant and solicitor clients by telephone on the Taxline, and dealing with project work generated. He covers most aspects of income tax, CGT and corporation tax, aiming to provide constructive solutions to tax problems, especially concerning property tax, partnerships, mergers and acquisitions, buy-backs, demergers, SDLT, stamp duty and basic SDRT. He presents at TSP and external seminars and conferences and assists with Tax Insight, the journal published by TSP.



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Nigel is an associate tax director in the Tax Support for Professionals team who has worked full time on the Taxline since 2012, dealing with the full range of client tax queries, including income tax, corporation tax, CGT, SDLT and IHT matters. Prior to joining the Taxline, he had 27 years' experience working his way up from an administrative assistant at HMRC to a senior personal tax manager at BDO. He has a wide range of personal tax experience, including residence/domicile issues, CGT advisory and planning, LLPs/partnerships and inheritance tax.



**CHRIS HOLMES**

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Chris is a tax director, specialising in all aspects of owner managed business, including transactions. Chris has particular expertise with such diverse subjects as demergers, property, pensions, expatriate tax and tax debt.



**SADIQ HASHMI**

TAX MANAGER

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Sadiq is a tax manager who joined the Tax Support for Professionals (TSP) team in 2019. Sadiq is a generalist, with particular competence in advising on personal tax matters, especially in the areas of Pensions, PPR, and CGT. Prior to joining TSP, he worked in similar tax advisory roles with Moore Stephens and Grant Thornton.

# OUR SPECIALISTS

THE TAXLINE TEAM IS BACKED UP BY BDO'S NETWORK OF TAX PROFESSIONALS IN THE UK AND WORLDWIDE, ENABLING US TO DEAL WITH THE WIDE RANGE OF TAX AND OTHER ISSUES THAT CAN ARISE IN PRACTICE.

## SPECIALIST AREAS INCLUDE:

- ▶ Personal tax, trusts and inheritance tax planning
- ▶ Corporation taxes
- ▶ Capital allowances - delivered by our team of dual qualified surveyors
- ▶ Company acquisitions, reorganisations and disposals
- ▶ Tax dispute resolution, including ADR
- ▶ VAT and Customs duties
- ▶ International tax for both individuals and companies
- ▶ Employment taxes
- ▶ Expatriate taxes
- ▶ Share based management incentives
- ▶ International social security
- ▶ Construction industry scheme
- ▶ R&D tax and Patent Box relief – where we are a leading provider
- ▶ Creative industries
- ▶ Property tax issues, including SDLT and ATED
- ▶ Not for profit
- ▶ Medical practices
- ▶ Stamp Duty

## WE ALSO HAVE SPECIALISTS IN MANY NON-TAX AREAS, INCLUDING:

- ▶ National Minimum Wage
- ▶ Valuations (intangible assets and real estate)
- ▶ Private client debt advisory
- ▶ Company secretarial
- ▶ Defined benefit pension scheme advisory

# REGIONAL TSP TEAMS

WE HAVE A NETWORK OF OFFICES ACROSS THE UK TO OFFER YOU SPECIALIST SUPPORT LOCALLY. REGIONAL TEAMS ARE LED BY:



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# ABOUT BDO

BDO UK

**18 OFFICES** **350 PARTNERS**  
**5,650 STAFF**

**97%** OF OUR  
CLIENTS  
WOULD RECOMMEND US<sup>1</sup>

**2019/2020 RESULTS:**  
REVENUES<sup>2</sup>  
UP 14% TO **£660m**



BDO INTERNATIONAL

**US\$10.3 billion**  
2019/2020 REVENUE

A YEAR ON YEAR INCREASE OF **7.8%**<sup>1</sup>

**167 Countries** **1,600 Offices**  
**91,000 Staff**

1. At constant exchange rate.



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