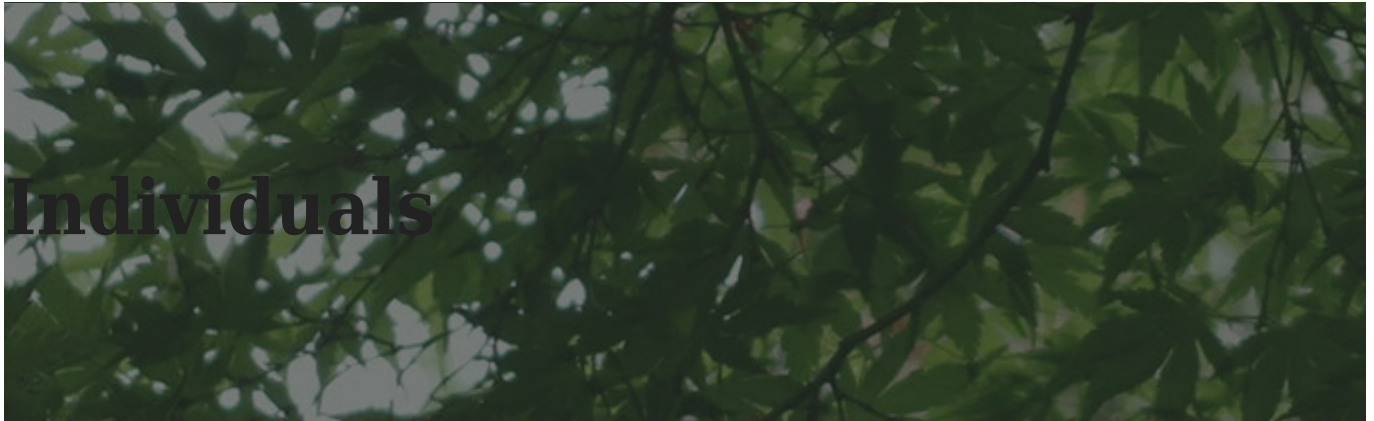


Individuals



Income Tax Review and Planning

If income tax efficiency is your current priority, you can benefit from our guidance in setting out a formal plan which will include all of your income streams and the potential taxes involved.

Free consultation

We offer a free initial consultation and can outline the benefits which could apply when we understand your current position. It could benefit your team too, as we can offer your best people a free review.

We can provide a full review of every aspect of your personal tax 'life', engaging with you to ensure that:

1. You are both tax efficient and legally compliant, ensuring you benefit from peace of mind.
2. Your plans dovetail with the lifestyle review we conduct for you, should you require it.
3. You find yourself in the best and most efficient business structure to maximise the returns which you deserve.

Links to Independent Advisers

With 30 years in practice we have numerous local and national contacts to help with insurance, HR, IFA matters and so much more.

Guaranteed savings

We guarantee to save you money in one or more of the following areas (whichever may apply): tax, fees or business and personal efficiencies.

Regular contact with us can ensure that you benefit as your plans evolve.

Specialist phone assessment

Call our office today for a phone assessment with one of our Self Assessment specialists. We can give you guidance on what to do next based on your personal situation. Our friendly staff are always ready to help, give us a call on 02380 812162

[Contact us for a free quotation](#)

More information

Inheritance Tax (IHT)

Death and taxes are the certainties in life, but smart Inheritance Tax planning will benefit not only yourself, but also your loved ones during a difficult time.

You are better off planning well for all your tax affairs - and IHT is no exception. Some practitioners see it as an 'optional tax'. Other individual taxpayers feel they are lowering the risk by spending inheritance money but all of these areas may need review.

Looking at your whole estate

We offer a free consultation covering every aspect of your whole estate. You will benefit from lifestyle reviews and planning around the question that most frequently crops up - what are my assets worth?

We will engage with you to make sure these questions are answered:

1. Will I owe tax when I die and who administers it?
2. How do I survive old age with my current assets?
3. Can I pass the family home down to relatives?
4. How are my assets taken into account if I need social services care later?
5. How do I maintain an income but not my assets?

If you own assets worth more than £325,000 (frozen to 2015) or as a married couple £650,000, you should be concerned about IHT and plan ahead. We can help you with your Will. It is vital that you are introduced to professionals in this

field and we have links to expert advisers.

Use applicable gift sums

It may benefit you to make gifts and use annual exemptions and one-off wedding gift sums, but plan wisely. If you wish to 'ring-fence' assets or be covered for potential IHT, our specialist advisers have resources to hand to ensure your complete peace of mind.

Free IHT assessment

Call our office today for a free assessment and we can go through the essential areas with you. Our friendly team is ready to help on 02380 812162

JOIN OUR MAILING LIST

- Enter your email address for monthly industry insights to keep you ahead

Recent News

- [August Newsletter 2017](#)
- [Budget Report Spring 2017](#)