

Application form

David Allen

Select one of the following options:

I would like to join the tax retainer scheme

I would like to renew my membership of the tax retainer scheme

Name (print)

Business name (if applicable)

Address

Annual fee £

inc. VAT

Signature

Date

Payment options (please tick your preferred method):

I would like to pay by BACS

I would like to pay by debit/credit card

I enclose a cheque for _____ made payable to David Allen

Please quote your personal or business name as a reference

For payment by BACS:

Bank details: Natwest Bank Plc

Account name: David Allen

Sort code: 60-04-30

Account no: 78014867

For payment by Credit/Debit card

please visit

<https://payments.david-allen.co.uk/>

or contact us on 01228 711888

mail@david-allen.co.uk • david-allen.co.uk

We've got you covered...

Our tax retainer scheme alleviates the daunting worries, disruption and expense of a tax investigation. We will work on your behalf to answer HMRC's questions and help demonstrate that you are paying the right amount of tax. We know you and your business and we want to help you when you need us the most.

The additional cost of our professional expertise and time to act on your behalf will be fully covered by the tax retainer scheme giving you complete peace of mind. Paying a little now could save you thousands in the future...

What's included...

Our tax retainer scheme covers the professional fees you would incur from the following situations:

- a HMRC enquiry into a personal tax return
- a HMRC enquiry into a business tax return
- a HMRC enquiry into your accounts
- a HMRC enquiry into a VAT return
- a dispute with HMRC with regards to VAT
- a dispute with HMRC with regards to PAYE or National Insurance
- a dispute with HMRC over the tax status of your workers
- a dispute with HMRC over the IR35 status of your business

If you are a partnership or limited company we also cover all the partners and directors along with their spouses.

What's not included...

There are some costs that are not covered by our scheme, these include:

- any tax, penalties, interest or other amounts due to HMRC that were outstanding prior to the investigation
- defence in prosecution cases or serious fraud enquiries
- costs relating to pre existing enquiries
- any tax, penalties, interest or other amounts due to HMRC as a result of the enquiry

Contact us today to learn more about how we can keep you and your business in safe hands.

David Allen

What would you do if you or your business faced a HMRC enquiry?



We know you and your business and we're here to help

david-allen.co.uk

The chance of you or your business being investigated by HMRC has risen considerably in recent years. Since 2020 HMRC have introduced over 100 measures to tackle avoidance, evasion and other forms of non-compliance.

HMRC: The facts...

The new measures have secured and protected an additional £200 billion in tax revenue which would otherwise have gone unpaid.

The tax gap, which is the difference between the amount of tax that should be paid to HMRC and what is actually paid is estimated to be £35 billion.

Individuals and businesses across every sector need to be aware of the risks of a tax investigation. Even if you have done nothing wrong you can still be subject to an investigation which can take up a lot of your time and cost a significant amount in professional fees.



David Allen retains complete discretion and has the right to decline to act for you in relation to your enquiry. On the opening of an enquiry we will advise you if we will act for you. We reserve the right not to act at all times.

Whether you're a business owner, director or an individual tax payer, crossing your fingers won't keep the tax man away!

Why leave yourself open to the risk?

Without our tax retainer scheme

- ✗ disruption to you and your business as you deal with the administrative burden of the tax investigation
- ✗ the added stress of dealing with HMRC
- ✗ reduced chances of success if you deal with it yourself
- ✗ a higher amount of tax due
- ✗ considerable professional fees if you require information or if you instruct a professional firm to act on your behalf, usually at an hourly rate in excess of £120

With our tax retainer scheme

- ✓ qualified professionals will provide you with full representation
- ✓ all correspondence will be dealt with on your behalf
- ✓ early intervention can lead to early resolution
- ✓ there will be no disruption to you or your business, we will do the hard work for you
- ✓ increased chances of success
- ✓ complete peace of mind

Our locations

Carlisle

Atlantic House
Parkhouse
Carlisle
CA3 0LJ

Tel: 01228 585300

Dalston

Dalmar House
Barras Lane Estate
Dalston, Carlisle
CA5 7NY

Tel: 01228 711888

Dumfries

51 Newall Terrace
Dumfries
DG1 1LN

Tel: 01387 270340

Penrith

3 Hobson Court
Penrith 40
Business Park
Penrith
CA11 9GQ

Tel: 01768 877000

Workington

Prosper House
Regents Court
Guard Street
Workington
CA14 4EW

Tel: 01900 878000

mail@david-allen.co.uk

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-  Accountancy and Audit
-  Tax
-  Financial Services
-  IT Solutions
-  VAT
-  Agriculture
-  Payroll
-  Recovery Solutions

