



Your Tax Partner

Tax Services For Professional Advisers

Professional tax services tailored to you and your practice

Making the complex simple

etc
TAX

WHY IS TAX IMPORTANT TO ME AND MY PRACTICE?

- Technology is changing the relationship between clients and their advisers. As more routine tasks become automated, advisers need to identify new areas to add value to their clients and their own practices.
- Tax is complex and the volume of tax legislation changes each year meaning you would require a team of experts to spot every issue, opportunity and relief.
- Tax may influence clients' long-term ambitions and future growth plans. They may look to switch advisers if they do not feel their current adviser is meeting their needs.

AS A RESULT...

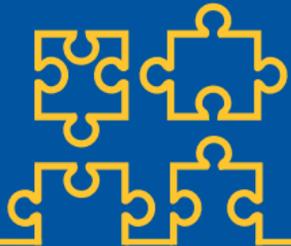
- Issues, opportunities and reliefs can be missed.
- Clients can pay more tax than they need to.
- Clients may look to another firm to meet their requirements.
- The complexity of client situations can mean that issues are overlooked resulting in losses to the client which cannot be recovered.



WHO ARE ETC?

ETC Tax is a specialist tax advisory firm.

- Our tax consultancy services cover the full range of tax services ordinarily found in the tax departments of the larger accountancy firms.
- Our team of experienced Chartered Tax Advisers draw on a wealth of experience gained in Big 4 and Top Ten accountancy firms, supported by a team of passionate junior tax advisers and committed business support staff.
- We deliver independent advice with a personal approach at an affordable price.
- We enable our professional adviser partners to provide a full service offering to their clients, helping them to enhance and grow their practices.



WE ARE NOT

ETC Tax are not a firm of accountants, we are tax specialists

- We do not offer packaged products. We understand that each client and their circumstances is different.
- We are not salespeople. We have all worked in practice and understand the challenges that you face. Often, the best advice for a client may be to do nothing, or perhaps the most commercially driven solution in the circumstances may not necessarily be the best option from a tax perspective.
- We are not a telephone hotline. We know this service is available, but we believe we offer something different. We are here for you when you need planning advice, a second opinion or to help you to open a dialogue with your clients. Of course, we are always available for those 'quick queries' too.



“As a relatively small tax practice, members of the team at ETC Tax have proven an exceptional source of support to our firm. Whether it’s a second opinion on a technical point, or advice on a general issue that is required, we regularly turn to ETC Tax for guidance.

Without doubt, ETC Tax enables us to complement our compliance duties with a more enhanced and extensive tax advisory service – adding real value for and on behalf of our clients”.

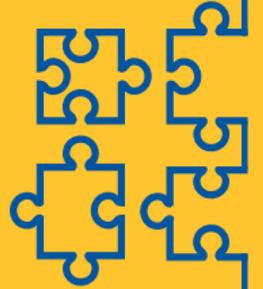


Roger Ambrose, Owner - Ambrose Associates Taxation Services, Bexleyheath

WHO ARE YOU?

You are likely to be a professional adviser who:

- Is looking to maximise opportunities to add value to your practice and for your clients.
- Would like to offer more or better tax services, but lacks the confidence to deal with some of your clients' tax queries.
- Has all the tax knowledge they need within their practice, but doesn't have the time to meet all of their clients' tax requirements.
- Is looking to grow their firm, but may lack the in-depth tax knowledge to be able to accept an annual recurring appointment to advise your clients on tax issues.
- Wants to be sure they are effectively managing risk in their practice by bringing in specialist help.



WHY USE ETC TAX?

OUR VALUES

- **Collaborative** - we recognise the pressure that clients can put you under and we will work with you to ensure that you are always able to manage your clients' expectations. You can use us in a way that best suits you. We understand and appreciate that not all professional advisers work in the same way.
- **Enterprising** – through our Your Tax Partner service you have access to a depth and breadth of experience found in larger firms, but at significantly reduced costs. Our advice is structured in a way that is truly effective in meeting the needs of high net worth individuals, entrepreneurs and SME clients.

- **Enhancing** - our multidisciplinary team sit and work together, sharing knowledge to ensure that all tax aspects of your queries are considered.
- **Valued** – just as you value your own clients, we value you and your firm as we do our own. We take pleasure in assisting you to win new clients, retain existing ones and grow your practice.
- **Honest** – we are an approachable and honest team, who recognise that there is no such thing as a stupid question. Our honest approach also applies to our fees - we are both fair and transparent on costs, and will work with you and your clients to meet your requirements.



“As a law firm giving specialist advice to high net worth clients, we often need specialist tax advice on corporate and property matters to co-ordinate with the legal advice we give our clients.

We have used the team at ETC Tax for the last few years and have always found that the advice they give is practical and concise with a sound commercial basis. We would not hesitate to recommend them”.



Richard Saleh, Senior Partner - Salehs Solicitors, Didsbury

OUR COSTS

What does it cost?

Our Your Tax Partner service operates on a credit-based system.

You only pay for what you use.

Each credit costs £60 plus VAT at our standard rates; but you can also purchase bundles of credit at a discounted rate.

Why should I buy a bundle?

You save money buying a bundle because you get more emails, calls, meetings or updates for your money.

What are the bundle options?

10 credits for £540 plus VAT
(equivalent to a 10% discount or 1 free credit)

25 credits for £1,275 plus VAT
(equivalent to a 15% discount or 3.75 free credits)

50 credits for £2,400 plus VAT
(equivalent to a 20% discount or 10 free credits)

100 credits for £4,500 plus VAT
(equivalent to a 25% discount or 25 free credits)



WHAT DO I GET FOR MY CREDITS?

 SERVICE	 DETAILS	 CREDITS
▶ Phone or video call	15 minute units (we don't charge for the first 15 minutes)	1
▶ Email	15 minute units	1
▶ Written advice note	15 minute units	1
▶ New client (tendering) meeting	1 hour meeting – video call, conference call or in person*	4
▶ Desktop tax review	Key client tax review – designed to generate opportunities for you to win new business	4
▶ Annual budget update	Delivered by webinar Delivered in person*	4 (or free where you have spent at least £5k plus VAT with us in the last 12 months) 8
▶ Bi-annual tax update	Delivered by webinar or in person*	24
▶ Quarterly tax update	Delivered by webinar or in person*	40
▶ Bespoke in-house training	1.5 hour bespoke training session on a subject of your choice; relevant to your business and your clientbase	8

* Additional costs may apply where services are delivered in person. Please refer to our T&Cs for more details.

“We are a firm of independent financial planners. Working with ETC Tax has helped our clients to consider tax planning options which go beyond our expertise. ETC Tax are very knowledgeable, and overall, this relationship has provided us with a reliable partner to support our advisory process”.



Kalpesh Jethwa, Independent Financial Planner - Trusted Strategic Planning, London

FAQs

OTHER PRACTICAL QUESTIONS

Who is my point of contact?

You will be assigned a relationship manager who will be your first point of contact for all queries. However, emails, calls, updates and training may be dealt with another member of our experienced tax team depending on the subject matter.

We have employees. Can all of our staff use this service?

As many people as you wish can use the service, but if you wish to limit its use to certain individuals within your practice, we will ask you to give us details of those individuals when you sign up so that we can be certain that those contacting us have permission to do so.

How quickly do you respond to queries?

We aim to provide you with an initial response within 24 hours of your initial contact (or to outline the timescales for a more detailed response).

WHAT OTHER SERVICES DOES ETC TAX OFFER?

Am I restricted to using ETC Tax for Your Tax Partner service?

No. Whilst the engagement letter you sign will be specific to Your Tax Partner, we offer many different tax services, and can discuss with you how else we may be able to assist you and your clients.

Why can't I just refer my client directly to you?

You can always refer your client to us directly. This is another service that we offer, and we are happy to discuss this service with you. We regularly work with professional advisers on a project basis, usually on a fixed fee. If this become relevant, please do discuss this with your relationship manager or call us on 0333 358 0366.



FAQs

HOW DOES IT ALL WORK?

How do I get started?

We will engage with you to provide you with ongoing tax advice, as applicable. We will need to complete standard AML checks, and set you up on our payment system, and then we can get going.

How can I buy a credit bundle?

Please phone 0333 358 0366 or email yourtaxpartner@etctax.co.uk. An invoice will be raised within 24 hours, and once funds have been debited, the credit will be allocated to your account and will be available for you to use.

How do I know how many credits I have used?

We will update you each time credits are used to let you know your credit balance.

Do you tell me when my credit bundle is running low?

Yes, you will be kept informed about your credit status, and we will warn you if you are running out of credits and invite you to 'top up'.

How long do I have to use up my credit?

You have 12 months to use your credit bundle, after which time any remaining credit will automatically expire. No refunds can be given, but we will keep you informed of your usage throughout the 12 month period, so that you have plenty of time to ensure that you use all of your credits.

Is there a restriction on the number of people who can attend the budget updates and training sessions?

No, as long as they are employed (or otherwise engaged) by you, any number of people can attend. However, attendees should not include those from other companies and/or clients without prior written approval from us.



“Hutchinson Legal & Associates Limited provides estate planning services to private clients and business owners across the UK.

We regularly encounter situations that require the additional expertise of tax advisers and to have a trusted associate tax partner to speak to and liaise with is vital. Whether a quick telephone call is required or bespoke advice, ETC Tax have become a vital part of our service proposition, providing effective solutions to our clients wherever they may be”.



Dr Paul Hutchinson, Founder and Director - Hutchinson Legal & Associates, Bristol

CONTACT US

If you have any other queries on our Your Tax Partner service, please contact us on 0333 358 0366 or email [**yourtaxpartner@ectax.co.uk**](mailto:yourtaxpartner@ectax.co.uk)

Your feedback and comments are important to us and will allow us to provide you with a bespoke service that meets you and your clients' needs.

Full T&Cs for the Your Tax Partner service can be found on our website at [**www.ectax.co.uk/your-tax-partner**](http://www.ectax.co.uk/your-tax-partner)



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