



Protect yourself and your  
business with our

# Tax Investigation Service



WR

Partners®

Accountants, Tax & Business Advisors

## A sensible choice.

We recommend all our clients consider joining our Tax Investigation Service. Every year, HMRC carries out enquiries into the tax affairs of an increasing number of individuals and businesses in the UK. Many people find an HMRC enquiry disruptive, intrusive, stressful and ultimately expensive.

Joining our Tax Investigation Service, provides peace of mind knowing we are here to help you when HMRC come calling.

With a national debt of over £2.72 trillion, as of March 2024, we fully expect HMRC to raise more enquiries this year to increase tax revenue.

Not only does our service pay our professional fees in the event of a check on your tax affairs, it enables us to provide expert advice and guidance to you every step of the way.

We have taken out an insurance policy in our own name that is backed by Professional Fee Protection (PFP), one of the UK's leading providers. Our policy enables us to provide you with expert advice and peace of mind knowing we will work on your case to resolve the situation up to our service limits.



### **You could be at risk of an enquiry**

There does not need to be a reason for HMRC to check your tax affairs. Every taxpayer who submits a tax return is at risk of being targeted.

Many thousands of enquiries are launched each year resulting in no extra tax being charged, yet the professional fees and costs associated with defending the original tax return still have to be paid.

Even if you have done nothing wrong, many tax enquiries are conducted at random. Each of these enquiries can be expensive to work through.

### **Saving you money and stress**

Our service will pay our professional fees that result from most types of HMRC enquiries or full investigation (full details are listed on the Service Summary).

# Our Tax Investigation Service can help to protect you if HMRC come calling

When you subscribe to our Service we are able to make a claim against our insurance policy (subject to acceptance by the underwriter), with Professional Fee Protection, in respect of our fees

incurred (up to £100,000 per claim unless otherwise indicated) when we defend you if you are subject to any of the following events:

- Full Enquiry
- An Aspect Enquiry
- A Business Inspection Notice
- VAT/PAYE/CIS Compliance Visit
- VAT Dispute
- PAYE/NIC/CIS Dispute
- Employment Status Dispute
- IHT Cover \*
- Gift Aid Inspection
- Partners/Directors Cover
- Application for a Judicial Review \*
- Code of Practice 8 Investigation \*
- IR35 Status Check
- IR35 Dispute
- Interventions (Informal Enquiries)

\* The limit of indemnity for this is £5,000

## Annual Subscription cost (please tick)

|                        |                       |         |  |
|------------------------|-----------------------|---------|--|
| <b>Individual</b>      | Personal Tax Only     | £72.00  |  |
|                        | Sole Trader           | £142.00 |  |
| <b>Rental Income</b>   | Up to £2m             | £200.00 |  |
|                        | £2m to £10m           | £375.00 |  |
| <b>Partnership</b>     | Turnover up to £10m   | £210.00 |  |
|                        | Turnover £10m to £25m | £385.00 |  |
| <b>Limited Company</b> | Turnover up to £2m    | £200.00 |  |
|                        | Turnover £2m to £10m  | £375.00 |  |
|                        | Turnover £10m to £25m | £725.00 |  |
| <b>Trading Trust</b>   | Turnover up to £2m    | £200.00 |  |
|                        | Turnover £2m to £10m  | £375.00 |  |

**If your business exceeds the above criteria please contact us for a bespoke quote.**  
**Should you leave WR Partners, your subscription to our Tax Investigation Service will cease.**

The annual subscription costs we charge depends on your type of business and/or your turnover. Please tick the applicable box for the type of subscription you require. **If you require a subscription for more than one entity, a separate application will need to be submitted. The costs indicated are inclusive of VAT.**

The business subscription includes Sole Traders, Directors, Partners and their spouses and Company Secretaries of the business for their personal tax returns (subject to such returns being prepared by WR Partners). However it will not extend to any other business activity in which they are engaged, nor will it include enquiries into rental income in excess of £50,000 per annum. A separate business subscription will be required to cover each of these.

# Method of payment

## Preferred method of payment

☐ **BACS** - You can make your payment to account number 12601969 and use sort code 55-50-05

**Important:** Please ensure that you quote your WR Partners client code as reference followed by PFP in the payment reference field.

## Your details

|  |         |
|--|---------|
| Name of Business or Individual to be included: | Address |
| Contact Name:                                  |         |
| Email Address:                                 |         |
| Telephone Number:                              |         |
| Signature:                                     | Date:   |

**Offices in:** Shrewsbury, Nantwich,  
Newtown, Northwich and Wrexham

**Nantwich Office**      **Phone:** 01270 692430

**Newtown Office**      **Phone:** 01686 626230

**Northwich Office**      **Phone:** 01606 654883

**Shrewsbury Office**      **Phone:** 01743 273273

**Wrexham Office**      **Phone:** 01978 261579

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