Focus on
Taxation Advisory Services

An enormous wealth of knowledge to help you protect today and plan for tomorrow.

burtonsweet

chartered accountants & business advisers

Protecting personal wealth and increasing your profit retention

Tax planning, asset protection and the minimisation of liabilities are all central to creating financial security that protects and prospers existing and future generations. Tax planning is required by most individuals and businesses at some point, but the advice you receive should be tailored to your individual needs and by no means standardised or commoditised. Our tax specialists are trained to guide you through the legislation and make you aware of relevant opportunities.

Income and Capital Tax Planning

No matter what your personal status we can advise you on all aspects of income tax and capital gains tax planning, from tax efficient investments through to structuring ownership to minimise tax liabilities.

Personal Tax Service

We offer a service which takes the worry out of your personal tax compliance, including completion of your tax returns, reminders about tax payments, checking PAYE codes and just being at the end of the phone to answer your queries. We are here to take the stress out of your personal tax affairs.

Inheritance Tax and Estate Planning

We offer a full inheritance tax and estate service, from advising on the preparation of a tax efficient will, or utilising and maintaining reliefs through to using trusts to protect your assets. We also offer assistance with the preparation of lasting powers of attorney and executorships.

Business Services

All businesses have daily tax issues which they need help and advice with. We offer services aimed at taking the hassle away, from completion of tax computations and returns through to completing VAT returns and providing payroll services.

Corporate Planning

As with individuals, it is important that businesses ensure that they are minimising their tax liabilities. Our specialisms include restructuring, VAT advice, research and development tax credits, share schemes, remuneration planning and incorporation.

International Tax

The world is becoming a smaller place and more and more businesses are choosing to do business abroad, and more people are choosing to own assets in other countries. Our specialists advise you on all aspects of international tax, from purchasing a holiday home through to setting up a company in the Far East.

Advice and Support

For You

- Comprehensive personal tax planning
- Making the most of tax allowances
- Extracting profit from your business
- Saving and investing efficiently
- Reducing inheritance tax liability
- Inheritance tax planning
- Capital gains tax planning
- Retirement planning
- Estate planning, executorship and the administration of estates
- Self assessment and personal tax obligations
- Completion of US tax returns
- International tax advice including residency, moving abroad and buying assets overseas

For Your Business

- Minimising business taxes
- Capitalising on capital allowances
- Reducing the costs of company cars and motoring
- Accelerating expenditure or deferring income to improve the financial position
- Reducing the impact of increasing tax rates and changes to legislation
- VAT advice
- International tax planning including trading overseas
- Restructuring your business or your group
- Claiming research and development tax credits
- Tax efficient ways to motivate and retain key staff members

Case Study
Quick and Easy Wins

The Client
A successful self-employed surveyor in the South West.

The Challenge
The client was paying significant levels of higher rate tax whilst his wife was not utilising her basic rate band.

The Solution
We discussed the options available to the client and recommended that he incorporated the business as this would enable him to reduce his income tax liability.

By 'selling' the Goodwill of his sole trader business to the new company he was able to obtain a substantial amount of money on which he paid just 10% capital gains tax rather than 41% income tax and national insurance.

Following the incorporation, he also made his wife a shareholder so that she could receive income and utilise her basic rate band.

Great Results
As a result of our advice the client was able to reduce his family's overall income tax liability, enabling them to keep more of the money they earned.

> Burton Sweet helped us to consider our family's future tax liabilities, shared ideas on how to mitigate them and assisted in setting up appropriate wills. This has provided such peace of mind that I have insisted my brother undertake the same process.

Expert Advisers and Support

Rachel Finch

Title	Partner - Tax Advisory Services
Contact	01934 620011 / 01452 305651 rachel@burton-sweet.co.uk
Skills	Tax planning and restructuring
Business Types	Private individuals and SMEs
Specialisms	International trade and group restructuring

Rachel has over 20 years experience in the tax and accountancy profession. She has worked in almost every field from accounts preparation and audit through to international tax during her career. She joined Burton Sweet in 2007 and has created our specialist tax advisory team. She prides herself on providing commercial and practical advice which incorporates the full scope of tax and the client's affairs. Rachel is a member of three Chartered Institute of Tax technical sub-committees.

David Clutterbuck

Title	Partner - Taxation
Contact	01453 542483 david.clutterbuck@burton-sweet.co.uk
Skills	Personal and business taxation, trusts and estates
Business Types	Private individuals and small businesses
Specialisms	Project management and Brewing

David spent his first five years working in the legal profession, before seeing the light and converting to accountancy. He has over 30 years tax and accountancy experience, during which he has worked in all areas from accounts and audit through to probate and estates and complex tax planning. He prides himself on always being available to discuss problems, no matter how big or small, and providing solutions. David has a number of specialisms ranging from advice to the licensed trade through to trusts and estate planning.

Chris Mair

Title	Director of Taxation and Trusts
Contact	01934 620011 chris@burton-sweet.co.uk
Skills	Personal taxation including inheritance tax, trusts and estates
Business Types	Private individuals and small businesses
Specialisms	Trusts and estates

Chris joined Burton Sweet over 20 years ago and during his career he has become a qualified accountant, tax advisor and a trust and estate practitioner. He combines those skills to give advice to clients on a wide range of areas including annual accounts, tax compliance, corporation tax and capital tax planning. Chris is a specialist in estates, inheritance tax planning and trusts.

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