RoffeSwayne
chartered accountants

PRIVATE CLIENTS High Net Worth Tax Service

Why do we need to offer a new service?

We live in a time when things change very quickly and this is especially true of tax rules and rates. HMRC are restructuring to reflect the changing environment and consolidating returns for High Net Worth individuals or those with complex affairs into specialist departments. We obviously need to respond to these changes to provide our clients with the service they require.

What does the service offer?

The service is designed to ensure that private clients receive a pro-active service managing the tax affairs for themselves and their families, seeking to maximise wealth through careful structuring. This includes:

- Tax return preparation for the family group including trusts where appropriate
- Annual Wealth Report highlighting tax planning opportunities
- Regular meetings with your tax advisor

Our advisors will consider the income tax, capital gains tax and inheritance tax implications of any transactions you undertake or of any changes in your or your family's circumstances. We work closely with investment managers, independent financial advisers and pension specialists to offer the broad range of tax solutions we know you require.

Who to contact?

If you are interested in this service please phone 01483 416232 and speak to:

Linda Warner
Liz Beadsley
Rob West
Kathryn Knight

or your usual Roffe Swayne contact.

www.roffeswayne.com

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For more information please contact

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