RoffeSwayne
chartered accountants

Tax Services

PEOPLE
TEAMWORK
RELATIONSHIPS

www.roffeswayne.com

Our team of tax specialists delivers a range of tailored services for private individuals, trustees and businesses, helping you to achieve your personal and business objectives.

Tax Services

Good tax planning is one of the best ways to save money and enhance business value and personal wealth. Whatever your circumstances, our advice identifies the right balance between current obligations and future aspirations, your personal life and your business responsibilities.

Our tax team works closely with our other specialist teams to ensure you receive a complete and efficient advisory service.

We are able to advise on all aspects of your UK affairs and as members of the UK200 Group we can introduce you to like-minded firms in Europe and further afield to advise on and structure your international interests.

If you wish to discuss your needs further please contact: Linda Warner, Liz Beadsley or one of the team of specialists shown overleaf.

Tax Services for Businesses

Our dedicated team will help you integrate tax efficiency into your business to put you in complete control of tax costs. We achieve this through careful structuring including employee incentive arrangements, planning for specific transactions and helping with tax compliance obligations.

We work closely with you to understand your business to ensure we offer bespoke tax advice that anticipates your needs. We keep you regularly updated on the implications of any changes in legislation.

Our services include:
- Tax Compliance
- Corporation Tax Planning and Structuring
- Transaction Planning and Support
- Share Schemes and Employee Incentives
- Capital Gains Tax Planning
- VAT
- International Tax
- Investigations

Consulting Services Team

We understand that for many businesses, business finances are inextricably linked with those of their owner managers. Our consulting services team specialises in managing the complex interaction of personal and business taxes to minimise the total tax costs.

Our advisers will provide clear advice on -
- selecting the most appropriate business structure
- profit extraction
- remuneration planning

Private Client Tax Services

Our private client tax team are well placed to help you however complex your affairs may be.

We are able to assist you with all your basic tax compliance obligations as well as providing planning advice to achieve your objectives. We can help maximise your personal wealth through careful structuring of your affairs.

We work closely with investment managers, independent financial advisers and pension specialists to offer the broad range of tax solutions we know our clients require.

Our services include:

- Tax Compliance
- Income Tax Planning
- Capital Gains Tax Planning
- Inheritance Tax Planning
- Trusts and Executorships
- Investigations

High Net Worth Tax Service

We live in a time when things change very quickly and this is especially true of tax rules and rates. HMRC have restructured to reflect the changing environment and consolidating returns for High Net Worth individuals or those with complex affairs into specialist departments.

Our HNW 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 adviser

Our advisers 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.

About us

Based in Godalming, Surrey, Roffe Swayne is one of the region's largest independent firms of Chartered Accountants. Established in 1935, the firm has 12 partners and 70 staff providing extensive experience gained through a background in multinational accounting practices. Many of our team have been together for at least 10 years providing the reassurance of stability and consistency in the delivery of our services to our clients.

Although fully independent, Roffe Swayne is a member of the UK 200 Group of Chartered Accountants. This means that in addition to all the benefits of working with an independent firm our clients have the added advantage of being able to access the strength, resources and specialist expertise of a larger group.

Roffe Swayne is committed to its ongoing philosophy of forging strong personal relationships with its clients and understanding and meeting all their needs.

Our service levels are high, we respond quickly and this has contributed to the success of both our clients and our 15 strong Tax Team.

Locations served

We are geographically focused in the South East of England and London, but undertake work throughout the UK and on a worldwide basis.

The Tax Team

Linda Warner
Tax Partner

Linda is a highly experienced tax specialist. She works with owner-managed businesses to provide effective strategies to reduce and manage their tax costs. Her portfolio has a focus on property and technology and she advises on all aspects of UK taxation and the impact of international tax issues. Linda also advises private clients on their personal affairs including structuring their business interests. Linda is dedicated to providing a first class service to her clients.

lwarner@roffeswayne.com

Liz Beadsley
Associate Partner

Liz trained with Roffe Swayne and is a Chartered Tax Adviser. She works with both individuals and a wide-variety of different kinds of business to ensure that their tax is structured in the most efficient way possible. She specialises in inheritance tax and trusts and capital gains tax planning. Liz also heads up our specialist High Net Worth Tax service.

lbeadsley@roffeswayne.com

Kerena Allen
Tax Consulting Adviser

Kerena has in depth knowledge of the interaction of taxes which is particularly important within owner managed businesses and she is able to provide clear explanations on the application of tax laws and regulations. She has recently been involved with a number of property and construction client businesses. She specialises in Corporation Tax, tax investigations, P11D issues and OMBs.

kallen@roffeswayne.com

Mike Walsh
Senior Corporate Tax Adviser

Mike's extensive knowledge and years of experience of dealing with HMRC enable him to advise a diverse range of corporate clients on how to maximise their post-tax profits. This is particularly relevant to groups of companies and the manner in which tax losses are relieved, and available allowances utilised, at the earliest possible date. He specialises in tax investigations, property and manufacturing groups and capital allowances.

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Other Tax Department contacts

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High Net Worth Team

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Tax Consulting

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