



ALLEGRO TAX

Outsourced tax partner packages

Enhance your firm's tax advisory offering by investing in hours to suit your requirements and use them as you wish:

Ad hoc tax queries answered



Written confirmation of advice



Review of your client correspondence on the matter before you send it



Review of client files for tax opportunities



Attendance at client meetings (Zoom included, travel extra)



Also included:
10% discount on project work

Tax checklists to use with your clients to ensure opportunities are not missed

Monthly live lunch and learn

Summary of relevant Budget announcements white labelled for you to send to clients

Please note that monthly hours purchased cannot be used for discrete advisory projects which will always be priced separately and a specific engagement letter issued

Additional project based services include:
EIS/ SEIS Advance Assurance and compliance statements
Employee share schemes
Research and development tax credits
Restructuring
Exit planning for shareholders
Tax on settlement agreements and exit payments
Reviews of tax warranties and covenants

Pricing

	Pay monthly	Pay annually in advance: 12 months for the price of 11
2 hours per month: 10% discount on hourly rates	£540	£495
5 hours per month: 15% discount on hourly rates	£1275	£1170
10 hours per month: 20% discount on hourly rates	£2400	£2200

All fees are per calendar month, paid by direct debit in advance. VAT is applicable. Bespoke pricing available for 6+ partner firms

Comments from happy clients

"Thank so much for all your help so far! Lifesaver!"

"Thanks so much for everything Sarah. I really don't know what we would have done while X was off sick if we hadn't had you to help us"

"We have found great value in being able to use you as a 'sounding board'. We miss having a Chartered Tax Adviser amidst us since X retired and so we were delighted to have found you".