



# TAX SUPPORT FOR PROFESSIONALS

BDO LLP JANUARY 2024

IDEAS | PEOPLE | TRUST



# CONTENTS

PAGE 3  
WELCOME

PAGE 4  
OUR SUPPORT FOR YOU  
AND YOUR CLIENTS

PAGE 5  
WHY WORK WITH US?

PAGE 6  
CORE TAXLINE TEAM

PAGE 7  
OUR SPECIALISTS

PAGE 8  
REGIONAL TSP TEAMS

PAGE 9  
ABOUT BDO

# WELCOME

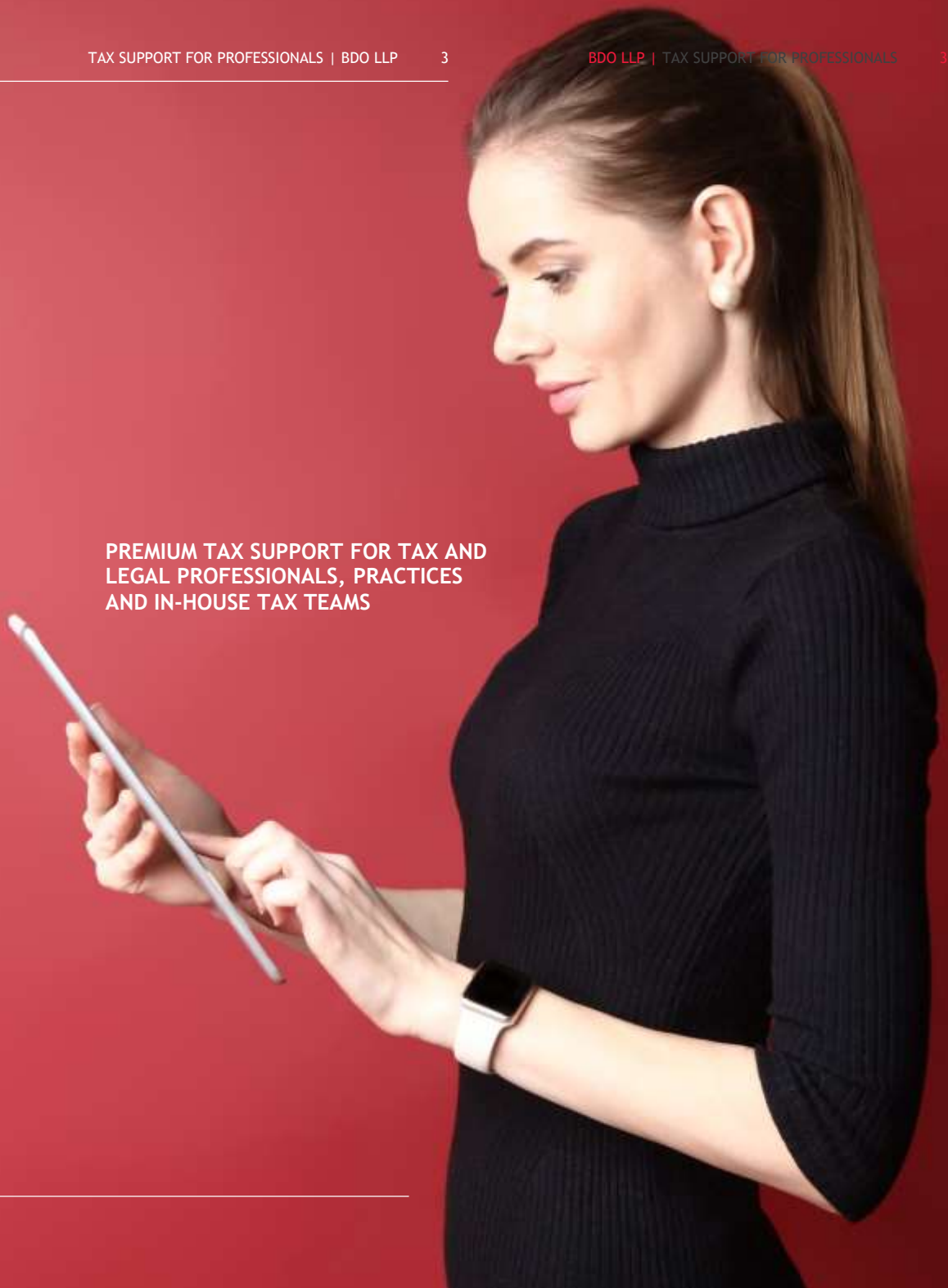
## TAX SUPPORT FOR PROFESSIONALS (TSP)

- ▶ Even a professional tax adviser can't be expected to know everything all the time. It can be invaluable to have easy access to tax expertise to discuss those tax issues you can't readily resolve yourself
- ▶ TSP offers a premium service of practical advice and solutions for professionals across tax, legal and accounting
- ▶ The core TSP service includes telephone support and assistance with projects across all taxes
- ▶ In addition, our clients have access to both BDO's tax and non-tax specialist services.

## LOCAL TEAM WITH INTERNATIONAL REACH

- ▶ Our TSP team has been supporting clients for over 30 years, so you can be assured that you will work with highly skilled experts
- ▶ Our TSP team is across our national offices, providing clients with the opportunity to work with their local BDO team. We also have the added benefit of being connected to BDO's extensive international network of experts, allowing us to offer access to services beyond tax.

**PREMIUM TAX SUPPORT FOR TAX AND  
LEGAL PROFESSIONALS, PRACTICES  
AND IN-HOUSE TAX TEAMS**



**MALCOLM PENGELLY**  
TAX PRINCIPAL

National Head of Tax Support for Professionals

+44 (0)20 7893 2936 (DDI)

+44 (0)79 6859 3797 (Mobile)

[malcolm.pengelly@bdo.co.uk](mailto:malcolm.pengelly@bdo.co.uk)

# OUR SUPPORT TO YOU AND YOUR CLIENTS

THE TAX CLIMATE IN THE UK IS ONE OF ALMOST CONSTANT CHANGE, AND TAX LEGISLATION CONTINUES TO GROW EVER MORE COMPLICATED.

When faced with complex queries from your clients, we can offer peace of mind as a source of expertise and second opinion. We are here to help.

## TAXLINE

0845 356 0006

[taxline@bdo.co.uk](mailto:taxline@bdo.co.uk)

Speaking to an experienced fellow professional is often the most efficient way to tap into their knowledge to confirm that you are on the right track or point you in the right direction when an area is new to you. Even if you have your own inhouse tax resource, our team can provide invaluable additional support.

Our 'Taxline' service provides fast, authoritative advice at a competitive rate:

- ▶ A monthly fee of £95 + VAT, plus
- ▶ £112 for the first 12 minutes (or part thereof), and £56 for each subsequent 6 minutes (or part thereof) for each call, up to a maximum of one hour per topic, plus
- ▶ A 5% service charge, unless payment is made by direct debit.

## PROJECTS

Many of our clients often like us to assist them when they feel they do not have the necessary experience and time or they are uncomfortable with the associated risk. We assist our clients by either working alongside them or in the background.

Projects can involve:

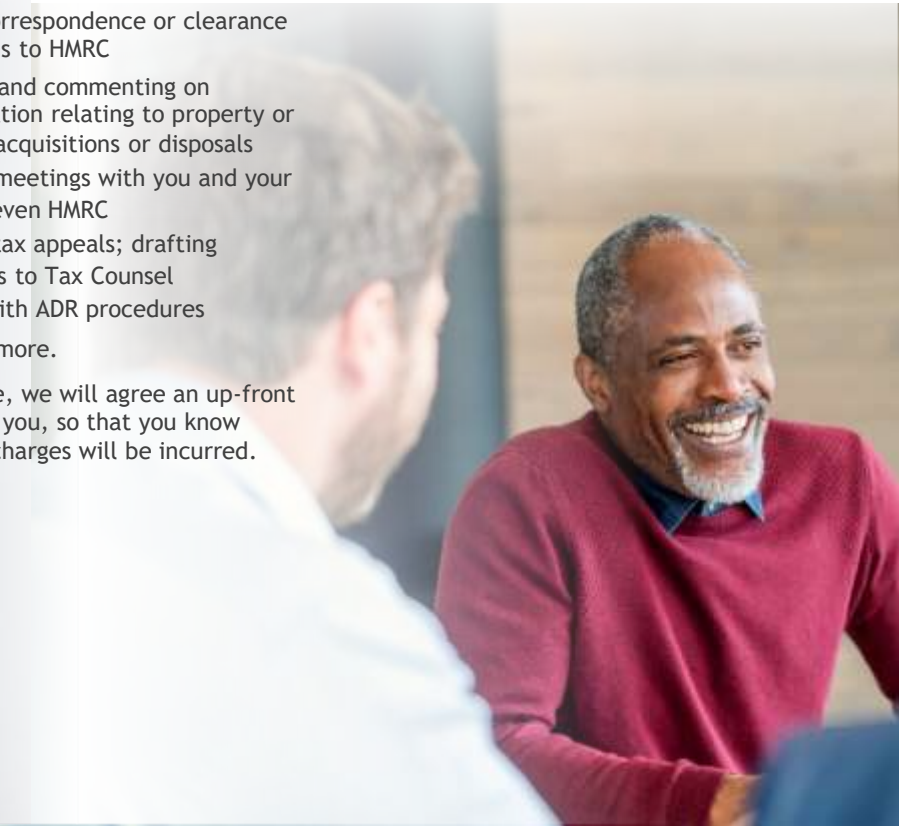
- ▶ Identifying solutions to meet your client's commercial objectives
- ▶ Drafting technical reports
- ▶ Drafting correspondence or clearance applications to HMRC
- ▶ Reviewing and commenting on documentation relating to property or corporate acquisitions or disposals
- ▶ Attending meetings with you and your clients or even HMRC
- ▶ Preparing tax appeals; drafting instructions to Tax Counsel
- ▶ Assisting with ADR procedures
- ▶ And much more.

Where possible, we will agree an up-front fixed fee with you, so that you know exactly what charges will be incurred.

## MORE FROM TSP

We are here to help and provide you with solutions to your question. We also want to help by sharing knowledge.

Our clients have access to a host of learning resources including regular emails, seminars and tax update webinars.



## WHY WORK WITH US?

### WE WILL

- ▶ Provide bespoke and practical advice, guidance and assistance, tailored to your client's specific circumstances and requirements
- ▶ Apply our experience to pre-empt issues or problems and find appropriate solutions
- ▶ Introduce our extensive team of specialists to ensure that you get the very best advice from the experts in a particular field
- ▶ Be approachable and available
- ▶ Offer you a platform to access our vast international network whilst still maintaining key relationships throughout
- ▶ Co-ordinate and manage projects cohesively and efficiently.

### EXCEPTIONAL CLIENT SERVICE

#### IDEAS | PEOPLE | TRUST

We believe in investing time and energy in our people and giving them the freedom to do their best work for you.

Our belief is that this will generate the insights and ideas that will make a real difference to you and your client relationship.

We are passionate about earning your trust and that of your clients. Trust allows us to deliver the best possible outcomes for you and means that you will continue to work with us.

That means:

- ▶ Making sure we take the time to understand you and your client's needs
- ▶ Being accessible and hands-on
- ▶ Staying flexible so that as your needs evolve, so does our approach to solving them
- ▶ Keeping our promises and making sure we deliver
- ▶ Asking the right questions, enabling us to foresee any potential issues or opportunities.

“What people tell us they like about BDO TSP is that we make them look good

MALCOLM PENGELLY | HEAD OF TAX SUPPORT FOR PROFESSIONALS”



## CORE TAXLINE TEAM

RUN FROM OUR LONDON OFFICE, OUR DEDICATED AND EXPERIENCED TAXLINE TEAM IS AVAILABLE THROUGHOUT THE WORKING DAY TO PROMPTLY RESPOND TO QUERIES. YOU CAN CONTACT THE TEAM ON 0845 356 0006, OR DIRECTLY, USING THE CONTACT DETAILS BELOW.



**MALCOLM PENGELLY**

TAX PRINCIPAL

National Head of Tax Support for Professionals

+44 (0)20 7893 2936 (DDI)

[malcolm.pengelly@bdo.co.uk](mailto:malcolm.pengelly@bdo.co.uk)

Malcolm has over 30 years experience advising family owned businesses in all aspects of UK direct tax, with particular experience of property businesses. He regularly advises on stamp taxes and SDLT issues, including property structuring, planning and share adjudications, and has advised family owned businesses regarding business reorganisations, acquisitions and sales and their tax efficient structuring. He lectures regularly on tax issues on internal BDO courses and externally.



**JEFFREY WEBBER**

TAX DIRECTOR

+44(0)20 7893 3578

[jeffrey.webber@bdo.co.uk](mailto:jeffrey.webber@bdo.co.uk)

Jeff is a director in the Tax Support for Professionals (TSP) team, providing advice to our accountant and solicitor clients by telephone on the Taxline, and dealing with project work generated. He covers most aspects of income tax, CGT and corporation tax, aiming to provide constructive solutions to tax problems, especially concerning property tax, partnerships, mergers and acquisitions, buy-backs, demergers, SDLT, stamp duty and basic SDRT. He presents at TSP and external seminars and conferences and assists with Tax Insight, the journal published by TSP.



**NIGEL GILES**

ASSOCIATE TAX DIRECTOR

+44(0) 20 7893 3192

[nigel.giles@bdo.co.uk](mailto:nigel.giles@bdo.co.uk)

Nigel is an associate tax director in the Tax Support for Professionals team who has worked full time on the Taxline since 2012, dealing with the full range of client tax queries, including income tax, corporation tax, CGT, SDLT and IHT matters. Prior to joining the Taxline, he had 27 years' experience working his way up from an administrative assistant at HMRC to a senior personal tax manager at BDO. He has a wide range of personal tax experience, including residence/domicile issues, CGT advisory and planning, LLPs/partnerships and inheritance tax.



**CHRIS HOLMES**

TAX DIRECTOR

+44(0)20 7893 3950

[chris.holmes@bdo.co.uk](mailto:chris.holmes@bdo.co.uk)

Chris is a tax director, specialising in all aspects of owner managed business, including transactions. Chris has particular expertise with such diverse subjects as demergers, property, pensions, expatriate tax and tax debt.



**SADIQ HASHMI**

TAX MANAGER

+44(0) 20 3219 4324

[sadiq.hashmi@bdo.co.uk](mailto:sadiq.hashmi@bdo.co.uk)

Sadiq is a tax manager who joined the Tax Support for Professionals (TSP) team in 2019. Sadiq is a generalist, with particular competence in advising on personal tax matters, especially in the areas of Pensions, PPR, and CGT. Prior to joining TSP, he worked in similar tax advisory roles with Moore Stephens and Grant Thornton.

## OUR SPECIALISTS

THE TAXLINE TEAM IS BACKED UP BY BDO'S NETWORK OF TAX PROFESSIONALS IN THE UK AND WORLDWIDE, ENABLING US TO DEAL WITH THE WIDE RANGE OF TAX AND OTHER ISSUES THAT CAN ARISE IN PRACTICE.

### SPECIALIST AREAS INCLUDE:

- ▶ Personal tax, trusts and inheritance tax planning
- ▶ Corporation taxes
- ▶ Capital allowances - delivered by our team of dual qualified surveyors
- ▶ Company acquisitions, reorganisations and disposals
- ▶ Tax dispute resolution, including ADR
- ▶ VAT and Customs duties
- ▶ International tax for both individuals and companies
- ▶ Employment taxes
- ▶ Expatriate taxes
- ▶ Share based management incentives
- ▶ International social security
- ▶ Construction industry scheme
- ▶ R&D tax and Patent Box relief – where we are a leading provider
- ▶ Creative industries
- ▶ Property tax issues, including SDLT and ATED
- ▶ Not for profit
- ▶ Medical practices
- ▶ Stamp Duty

### WE ALSO HAVE SPECIALISTS IN MANY NON-TAX AREAS, INCLUDING:

- ▶ National Minimum Wage
- ▶ Valuations (intangible assets and real estate)
- ▶ Private client debt advisory
- ▶ Company secretarial
- ▶ Defined benefit pension scheme advisory

Contact details for the full national team can be found at: <https://www.bdo.co.uk/en-gb/insights/tax/tax-support-for-professionals/national-tsp-team>

---

# REGIONAL TSP TEAMS

WE HAVE A NETWORK OF OFFICES ACROSS THE UK TO OFFER YOU SPECIALIST SUPPORT LOCALLY. REGIONAL TEAMS ARE LED BY:

## BIRMINGHAM:



PAUL TOWNSON  
Partner  
+44(0)20 3860 6000  
[paul.townson@bdo.co.uk](mailto:paul.townson@bdo.co.uk)

## BIRMINGHAM (VAT):



CHRIS ROWE  
Partner  
+44 (0)7791 245228  
[chris.rowe@bdo.co.uk](mailto:chris.rowe@bdo.co.uk)

## BRISTOL:



PAUL FALVEY  
Partner  
+44 (0)117 930 1635  
[paul.falvey@bdo.co.uk](mailto:paul.falvey@bdo.co.uk)

## LIVERPOOL:



IAN BINGHAM  
Partner  
+44 (0)151 237 4500  
[ian.bingham@do.co.uk](mailto:ian.bingham@do.co.uk)

## GUILDFORD:



MICHAEL FLAHERTY  
Partner  
+44 (0)148 340 8035  
[michael.flaherty@bdo.co.uk](mailto:michael.flaherty@bdo.co.uk)

## MANCHESTER:



STEPHEN HOLDEN  
Manager  
+44 (0)161 817 7611  
[stephen.holden@bdo.co.uk](mailto:stephen.holden@bdo.co.uk)

## EAST ANGLIA:



ANDY BUCHANAN  
Director  
+44 (0)1473 320848  
[andrew.x.buchanan@bdo.co.uk](mailto:andrew.x.buchanan@bdo.co.uk)

## SOUTHAMPTON:



JON HICKMAN  
Partner  
+44 (0) 20 7893 2496  
[jonathan.hickman@bdo.co.uk](mailto:jonathan.hickman@bdo.co.uk)

## LEEDS:



KAREN RILEY  
Director  
+44 (0)113 204 1207  
[karen.riley@bdo.co.uk](mailto:karen.riley@bdo.co.uk)



# ABOUT BDO

## BDO UK

**8** OFFICES **430** PARTNERS  
**7,070** STAFF

**95%** OF OUR CLIENTS  
WOULD RECOMMEND US<sup>1</sup>

**2021/2022 RESULTS:**  
REVENUES<sup>2</sup> UP **11%** TO **£809m**

1. Client Listening Programme (2019)  
2. Gross Revenues for BDO LLP

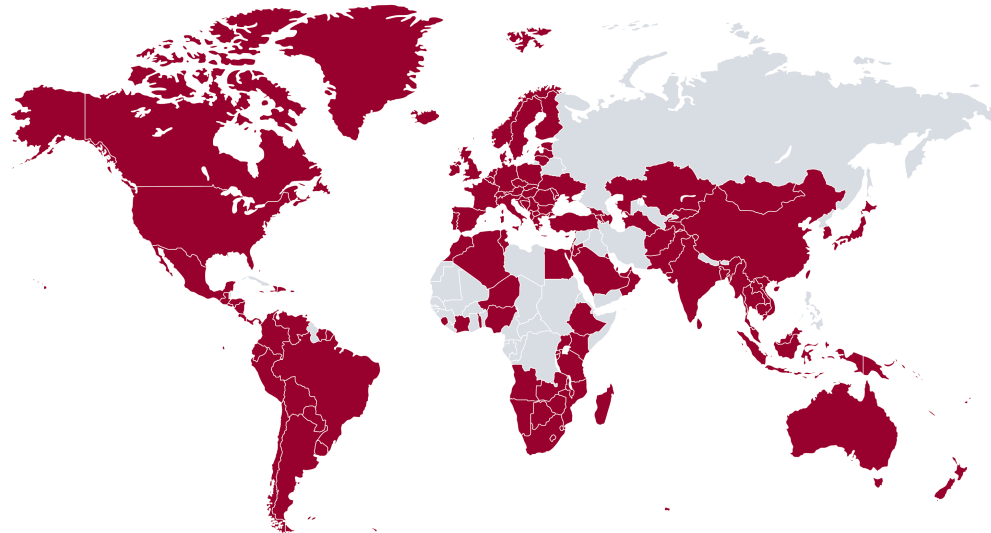
## BDO INTERNATIONAL


**US\$12.8 billion** 2021/2022 REVENUE  
A YEAR ON YEAR INCREASE OF **12%**<sup>1</sup>

**164**  
Countries

**1,800** Offices  
**111,300** Staff

1. At constant exchange rate.  
All numbers have been updated as of 30 September 2022.





This publication has been carefully prepared, but it has been written in general terms and should be seen as containing broad statements only. This publication should not be used or relied upon to cover specific situations and you should not act, or refrain from acting, upon the information contained in this publication without obtaining specific professional advice. Please contact BDO LLP to discuss these matters in the context of your particular circumstances. BDO LLP, its partners, employees and agents do not accept or assume any responsibility or duty of care in respect of any use of or reliance on this publication, and will deny any liability for any loss arising from any action taken or not taken or decision made by anyone in reliance on this publication or any part of it. Any use of this publication or reliance on it for any purpose or in any context is therefore at your own risk, without any right of recourse against BDO LLP or any of its partners, employees or agents.

BDO LLP, a UK limited liability partnership registered in England and Wales under number OC305127, is a member of BDO International Limited, a UK company limited by guarantee, and forms part of the international BDO network of independent member firms. A list of members' names is open to inspection at our registered office, 55 Baker Street, London W1U 7EU. BDO LLP is authorised and regulated by the Financial Conduct Authority to conduct investment business.

BDO is the brand name of the BDO network and for each of the BDO member firms. BDO Northern Ireland, a partnership formed in and under the laws of Northern Ireland, is licensed to operate within the international BDO network of independent member firms.

Copyright © January 2024 BDO LLP. All rights reserved. Published in the UK. [www.bdo.co.uk](http://www.bdo.co.uk)