

Tax Investigation Insurance Practice Proposal Document



Practice name _____
Contact name _____ Position _____
Address _____
Postcode _____
Telephone _____ Fax _____
Email _____

PRACTICE PROFILE

Number of partners _____ Total number of staff _____

Does the practice have any particular specialism? No Yes _____

Are you regulated for general insurance? No Yes

Do you currently have a Fee Protection Insurance No Yes, my renewal date is _____

Who is your current provider? _____ Is your current scheme all client/client decide? _____

Please provide hourly charge out rates for staff that will deal with the Investigations and Disputes:

Partner _____ Manager _____ Other _____

Tax senior _____ Audit senior _____

Please provide an approximate breakdown of your client numbers below:

	Total	Current take up on your optional scheme
Limited companies		
Partnerships		
Sole traders		
Directors/Partners		
Personal tax		
Other		

YOUR INVESTIGATION HISTORY

Does the Investigation History provided below refer to:

Your total client numbers?

Or

The clients who are currently covered by your scheme?

INVESTIGATIONS HISTORY

		Year one (last 12 months)	Year two	Year three
Self Assessment Full Enquiries	Total number			
	Total cost			
HMRC VAT Disputes	Total number			
	Total cost			
Employer Compliance Disputes	Total number			
	Total cost			
Income Tax Aspect Enquiries	Total number			
	Total cost			
Corporation Tax Aspect Enquiries	Total number			
	Total cost			
Schedule 36 Pre Disputes	Total number			
	Total cost			

I declare that the information provided is correct and gives a fair reflection of the practice. I understand that the information provided will form the basis of any quotation provided to me and will be treated in the strictest confidence.

Signature _____

Print name _____

Date _____

Arc Tax Assistance

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Our Firm Reference Number is 305958.
An AmTrust Financial Company.

