



INTELLIGENT**TAX**

THE PROACTIVE APPROACH
TO TAX PLANNING

POWERED BY  **PD TAX CONSULTANTS**
EXPERT TAX SOLUTIONS



INTELLIGENT TAX

The proactive approach to tax planning from PD Tax Consultants

By the time your tax bill drops through the letterbox, it's too late.

What if you could plan ahead to ensure that every key business decision you make not only drives your business forward, but could also save you money?

Intelligent Tax planning from PD Tax Consultants allows you to do exactly that, by creating a tax strategy that is aligned with your business strategy, enabling you to gain maximum advantage from the business decisions you are making now - as well as those you will make in the future.

Is Intelligent Tax Planning for you?

If you're an entrepreneurial business owner with ambitious growth plans – or a financial adviser working with businesses like this - Intelligent Tax planning could well be right for you.

- Grow your business?
- Set up a new business?
- Seek investment (venture capital, bank, business angel or other funding)?
- Acquire or dispose of a business or shares in a business?
- Buy, sell or lease business premises?
- Restructure your company?
- Engage in succession planning?
- Incentivise key staff through equity shares?
- Invest in Research & Development?
- Secure a patent?
- Seek advice on inheritance tax planning?
- Trade globally?

INTELLIGENT TAX IS...

- Strategic
- Proactive
- Structured
- Specialist
- Innovative
- Ethical & legal

INTELLIGENT TAX IS NOT...

- Tax evasion
- A quick fix

Using Intelligent Tax to proactively plan ahead enables you to identify the tax implications of key business decisions in good time and receive specialist advice on strategies that will ensure your decisions are not only right for your business, but that they are also tax efficient.

It also allows you to align your personal tax planning with your business planning.

How Intelligent Tax Works



Free of charge initial consultation

The first step is a free of charge meeting with one of our experienced tax specialists. This meeting will enable us to understand more about your business and your plans for the future, and allow us to identify areas where strategic tax planning could benefit you and your business. The meeting generally lasts for a maximum of two hours.



Ongoing support from an experienced team

From there, our team will provide an outline proposal tailored to you and your business, detailing the areas in which we can provide advice, guidance and support, which in turn will help you plan effectively and make tax efficient business decisions.



Strategic advice on tap

As well as regular meetings with your adviser, you will have access to our team whenever you need us for ongoing strategic advice and guidance.

The regular meetings will enable us to implement your tax strategy as well as keeping up to speed with your business plans, advising you on the tax implications of any changes within the business and helping you avoid potential pitfalls.

PD Tax has strong relationships with financial advisers and can strengthen your advisory team with specialist tax knowledge, keeping your advisers in the loop at all times and ensuring our work complements theirs to help you achieve your business goals.

Pricing

An annual fee is payable in a series of payments staged throughout the year, with additional fees quoted for implementing specific pieces of tax planning work identified within your plan.

- Complete peace of mind that the business decisions you make are also tax efficient
- The ability to maximise the financial return from future events within your business from a tax perspective
- Total clarity on the likely tax savings that can be made when implementing your business growth strategy
- Ethical advice and guidance from a proven team of tax experts
- No surprises – planning ahead means no unexpected tax bills
- Advice & support from an experienced team with a proven track record and reputation for high quality work
- A clear and transparent fee structure



PD TAX CONSULTANTS
EXPERT TAX SOLUTIONS

For more information, or to meet Paul Davison or Vikki Elliott for a coffee and a no-obligation initial discussion, contact PD Tax Consultants on 0113 887 8432.

Visit www.pd-taxconsultants.co.uk

PD Tax Consultants Ltd,
The Tannery, 91 Kirkstall Road,
Leeds, LS3 1HS

T 0113 887 8432
E paul.davison@pd-taxconsultants.co.uk
W www.pd-taxconsultants.co.uk