



# OUR TAX PLANNING SERVICES

**BIG FIRM  
EXPERIENCE**  
PERSONAL  
DELIVERY

# PREPARE FOR THE FUTURE

As tax planning specialists, DRG Chartered Accountants can help you prepare for the long term. We will look at both your corporate and personal tax situation and spend time really getting to know your aspirations before making recommendations.

*"We aim to provide effective tax planning advice for you and your business: from business start up to its eventual sale, from routine personal tax returns to complex capital gains and inheritance tax planning."*



David Gordon-Smith,  
Senior Tax Partner

## Effective Corporate Tax Planning

Good tax planning is fundamental to your long-term strategy. Having a clear idea of your income, expectations and long-term profit extraction is key to business owners.

### Clear, creative solutions that work

Our goal is to look at the bigger picture and provide solutions that reduce your tax burden over the long-term.

We always feel that it is best that entrepreneurs come and talk to us early, so that we can help you set up your business with the most tax efficient structure, with an eye on your plans for your eventual business exit or sale.

### Reduce the administrative burden

Our experienced tax team can help you with your routine corporate tax requirements and reporting to HMRC. The DRG accounting and tax departments work closely together to prepare your tax returns, computations and tax disclosures – so you get on with running your business, knowing that your tax is in safe hands.

### HOW WE CAN HELP YOU EVERY STEP OF THE WAY

#### Business start up

- Advise on the most tax efficient structure for your business
- Income tax & corporation tax planning

#### Growing businesses

- Tax efficient remuneration
- Tax planning for mergers, acquisitions & re-organisations
- Capital Gains tax planning
- Inheritance tax planning
- VAT
- National Insurance
- Routine reporting to HMRC
- Remaining compliant

#### Business sale or exit

- Tax planning for sale or transfer of a business
- Capital Gains tax planning
- Inheritance tax planning

## Tailored Personal Tax Planning Services

The DRG personal tax team has many years of experience of working with High Net Worth Individuals, entrepreneurs, expatriates and people with complex tax returns. We work hard to develop compliant alternatives with the objective of reducing your tax bill over the long term.

### Understand your future goals

The starting point will always be to take the time to get to know you, your personal situation and your future plans. Only then will we develop a personal tax planning strategy that will achieve your goals, whilst minimising your tax.

### Jargon-free advice

Our recommendations should be thoughtful always looking at the bigger picture. We will take the time to explain our advice in clear, jargon-free terms – and are always available at the end of a telephone, should you have questions at a later date. Once agreed, The DRG personal tax team will complete your tax returns and remove the administrative hassle.

### HOW OUR PERSONAL TAX TEAM CAN HELP YOU

- Tax planning for High Net Worth individuals
- Complex tax returns
- Directors' tax
- Foreign nationals' tax
- Inheritance tax
- Trusts and estate planning
- Share option schemes, such as EMI
- Tax efficient investments
- Capital Gains tax
- Investment properties
- Share portfolios
- Husband/wife planning
- Tax rebates
- Dealing with payments on accounts
- Loan relationship rules
- Investigation protection (insurance)

**If you would like to find out more about our corporate or personal tax planning services, please call 01628 760 000.**



#### **Audit & Assurance**

- Accounts preparation
- Statutory audits
- Internal audits
- Assurance reports

#### **Tax**

- Personal tax planning
- Corporate tax planning
- Expatriate tax services

#### **Wealth Management**

- Investments
- Pensions
- Inheritance tax planning
- Finance and mortgages

#### **Business Advisory**

- Business growth
- Corporate finance
- Due diligence

#### **Outsourcing**

- Company secretarial
- Bookkeeping
- Management accounting
- VAT
- Payroll

# DRG

Donald Reid Group

#### **DRG Chartered Accountants**

Prince Albert House  
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Berkshire SL6 1DT

#### **DRG Chartered Accountants**

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#### **CB Reid Chartered Accountants**

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Poundbury, Dorchester  
Dorset DT1 3AQ

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