

Client Categories Explained...

CLIENT CATAGORY	INCLUDED	EXCLUDED	FEE TYPE
Businesses with annual turnover above £25M. Including Charities with total income resources above £25M.	Personal tax return of the Directors, Director's spouse, Co Secretaries & their spouse (inc Civil & Common Law) if you are the tax return agent.*	Personal tax returns if: Annual GROSS income on the Land & Property pages is £50k or above. <i>Any part of the Self Employment pages are completed. In both cases a Separate Sole Trader policy will be needed.</i>	Bespoke Individual Company Fee will be given annually which will require you to complete a 'Larger Company proposal form'.
Businesses with annual turnover above £10M. Including Charities with total income resources above £10M.			Higher than Standard Fee, due to Auditing and Turnover making it a higher risk. (No proposal form is required, however, the Company name is.)
Limited Companies with an annual turnover up to £10M. Including Incorporated Charities with total income resources up to £10M.			Standard Limited Company Fee.
Partnerships including LLPs with an annual turnover up to £10M.			Standard Partnership Fee.
Sole Traders with an annual turnover up to £10M.	Sole Traders, Trading Charities & Trusts		Standard Sole Trader Fee.
Private Clients	Personal tax returns	Personal tax returns if: Annual GROSS income on the Land & Property pages is £50k or above. <i>Any part of the Self Employment pages are completed. In both cases a Separate Sole Trader policy will be needed.</i>	Standard Private Client Fee
	Non trading Charities & Trusts		

* See Exclusions