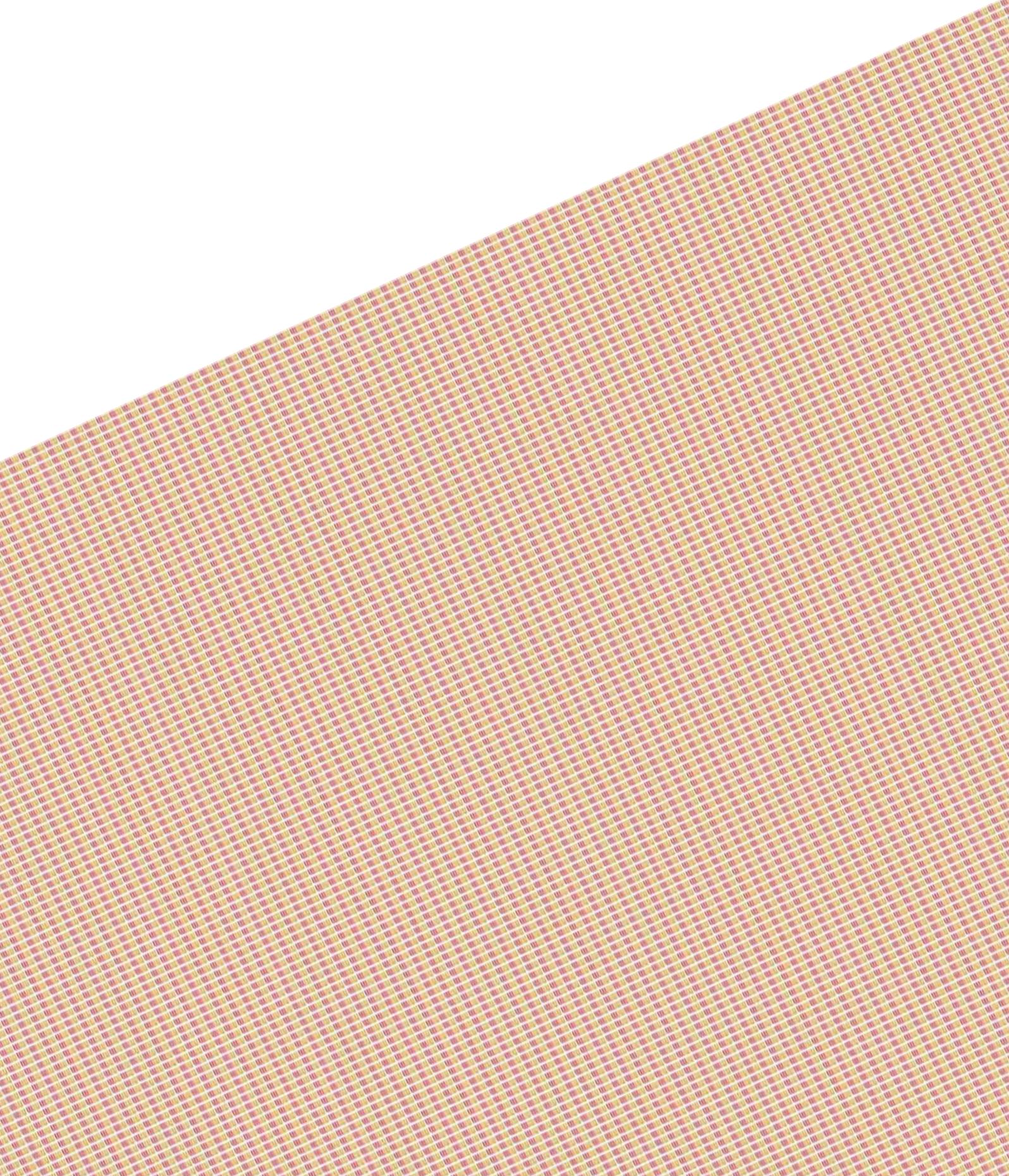




**watts woollett** LLP  
PERSONAL TAX SPECIALISTS



# Welcome



We provide independent fee based personal tax and general financial planning services to:

- Companies and their executives
- Private individuals
- Trustees and trusts

Our services can broadly be summarised as:

- Executive financial planning
- Personal tax consulting
- Tax returns

Email and online filing	For our clients who want to communicate by email and we file their return online
Traditional	For our clients who want traditional face to face meetings and written correspondence etc. Where possible we still recommend we file their tax return online given the earlier filing deadline for paper returns.
Review only	For clients who want to do their own return but have it checked by one of our partners before submission"

*We are a fast growing business run by an experienced team of David Watts and Mark Woollett who between them have over 60 years personal tax experience most of which has been gained at Big 4 accounting firms.*

David and Mark have known each other for many years. Apart from a 10 year period in the 80's and 90's when they worked together at Ernst & Young, their careers have followed parallel paths until it became obvious that it was to the benefit of their clients and themselves that they formally merged their respective businesses to become Watts Woollett LLP.

Over the years David and Mark have established a comprehensive network of people they like to work with. Our network includes many national and international clients and business colleagues. That way we can ensure maximum flexibility to build teams to meet our client's needs as necessary. We are also the UK representative firm of the Association of International Tax Consultants for our services.

David and Mark are also supported by Sally-Anne Watts and Claire Woollett who are their respective life and business partners. Sally-Anne was formerly with the Inland Revenue and has worked in administrative roles for many years. She also has her own alternative therapy business. Claire is an experienced midwife. She also has broad organisational skills developed over her years working with Brownies and Guides.



David Watts  
Chairman and Managing Partner

Mark Woollett  
Chief Executive and Managing Partner

# Our Services

## About our services

### Consulting and tax return services for individuals and trustees –

We can provide :

- Advice on all aspects of personal taxation and general financial planning by matching our knowledge and skills to your assets, background and future plans.
- Focused agenda based consulting meetings, ideally based on information provided beforehand so we can concentrate on delivering value when we meet.
- A detailed action plan, follow up implementation of consulting advice and tax return services.
- Many of the executive services listed below can also be tailored to individual circumstances.

### Executive Financial Planning services -

These services are usually developed with the company's HR team to meet the needs of the company and its executives.

The services can be corporate sponsored and either at the company's cost or as part of a sponsored flexible benefits programme. Alternatively, the services can be subject to a separate engagement letter with each executive with no direct corporate involvement.

Project planning is essential where Watts Woollett LLP involvement goes beyond ad hoc referrals. Project planning services typically include :

- assistance with the service launch to match the company business development network and corporate calendar as well as ;
  - co-ordinating the delivery of UK and international tax coverage.
  - Monitoring take up, service delivery to agreed benchmarks and costs to agreed fee budgets.
- Services to executives have a greater emphasis on enhancing the executive's awareness of (and value from) their company benefit package.

### Services delivered separately to each executive can include:

- agenda based executive consulting meetings
- detailed action plan and follow up consulting services
- email and telephone helplines
- tax return services

### Services delivered to groups of executives can include;

- helpsheets and other material for your intranet
- seminars, surgeries and workshops.

### About our fees

Our fee rates are significantly lower than larger accountancy firms yet we have an operating infrastructure to mirror those services in our areas of expertise with our experienced partners who have worked in that environment for many years. We can also work with your existing advisers or others that we introduce as part of a combined team where your requirements extend beyond what we can do for you directly.

Our fees are usually quoted in advance and are based on anticipated value and time spent.

Fee timetables depend upon the services required, timeline for delivery and the nature of the engagement.

### Why contact us now?

We aim to deliver proactive tax advice within acceptable boundaries for all concerned to minimise our collective risks whilst maximising the value of working with us.

HM Revenue & Customs current approach towards tax schemes and tax advice in general means it is now harder to achieve a workable last minute fix to reduce your taxes.

So acceptable proactive planning at the earliest opportunity has to be the sensible way forward.

## CONTACT DETAILS

You can contact David as follows :

Phone +44 (0) 845 260 0080

Email [david@wwtax.co.uk](mailto:david@wwtax.co.uk)

Fax ++ (0) 870 620 0081

Or via Sally-Anne Watts on :

Phone +44 (0) 7787 123842

Email [sally@wwtax.co.uk](mailto:sally@wwtax.co.uk)

Fax ++ (0) 870 620 0081

You can contact Mark as follows :

Phone +44 (0) 1225 400100

Email [mark@wwtax.co.uk](mailto:mark@wwtax.co.uk)

Fax ++ (0) 1225 400099

Or via Claire Woollett on :

Phone +44 (0) (7720 432352)

Email [claire@wwtax.co.uk](mailto:claire@wwtax.co.uk)

Fax ++ (0) 1225 400099

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[www.wwtax.co.uk](http://www.wwtax.co.uk)



executive financial planning

personal tax consulting

tax returns