

Tax consultancy support for professional advisers

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Tax advice for the discerning



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From time to time every professional adviser meets with a situation outside his immediate area of expertise and needs to seek assistance in one form or another.

We are experienced in offering tax and project management services in a variety of situations. Our involvement in a project can range from behind the scenes technical support for the principle advisers, on a disclosed or non disclosed basis, to a full up front involvement with a lead advisory role.

Whatever our level of involvement the adviser can rest assured that we are on his side. We have a no poach policy, indeed we simply don't do compliance! Our aim is to strengthen existing adviser client relationships by providing the necessary support.

You can rest assured that we have the necessary experience. David has been a tax specialist for over 25 years, 20 as a partner in charge of a major firm tax consultancy group at major local Black country and Birmingham firms.

In assisting you we aim to provide the following benefits;

- Timely specialist advice that helps you service your client.
- Access to experience which can lead to innovative solutions
- Most of our work is on a fixed fee agreed up front basis so that everyone has clarity.



A sample of the work we do;

- Corporate tax advisory including reconstructions and demergers, property transactions and general reorganisation issues;
- Inward investment and start up situations;
- Private client services including income tax planning, Capital taxes and estate planning services;
- Entrepreneurial services including buying and selling businesses, strategic tax planning and exit strategies;
- Employee incentive arrangements, including planning and implementation of EMI schemes.

Some examples of recent projects;

A major local law firm A was engaged by a client to assist with the removal of the chief executive and recover his shares. It was ultimately negotiated that the shares would be purchased by the company in an unusual way. JCL was retained on a subcontract basis by the law firm to gain advance HMRC approval to the transaction, and oversee the legal documentation to ensure that what HMRC had accepted was what was actually enacted. The transaction completed successfully.

A boutique corporate finance firm based in Birmingham was retained to sell a valuable local manufacturing firm "B". The advisers were unsure that valuable CGT reliefs were available and recommended that the position be reviewed by an expert. JCL assisted in a reorganisation of the two parts of the business to make it clear that relief was available and made recommendations to enable Spouse's reliefs to be maximised. The anticipated tax saving was extremely high, many times the fees involved.

A local firm of accountants had a client "C" who was a member of a religious order. His office was to be terminated by "mutual consent". The accountant recognised an unusual situation and asked JCL for specialist advice. The original contracts proposed by the lawyers would have had serious tax consequences which could have resulted in accelerated tax payments at a time when no funds were available but by re-negotiating the settlement JCL ensured that reliefs were maximised and the tax actually due was paid late rather than early! C remains a client of the accountant to whom he is very grateful. Additional input into the tax returns will be required in due course.

An accountant offering interim FD and consultancy services "looked after" a group of companies "D" which had developed an innovative new product. They received an approach from a consortium wishing to exploit the development of the product in Eastern Europe and possibly the Middle East in due course. JCL was approached to advise on the best holding structure that would accommodate the wishes of the various parties, prevent double taxation and unforeseen problems. JCL was able to make recommendations

A wealthy private client with investments in Spain and the Caribbean wished to receive advice on UK residence and domicile rules, particularly in the light of forthcoming changes and his desire to rationalise his business affairs. JCL produced a report which highlighted the opportunities available and liaised with foreign advisers to create a tailored course of action enabling him to realise an investment tax efficiently and also position himself for future investment.

If any of the above examples have struck a chord pick up the phone!