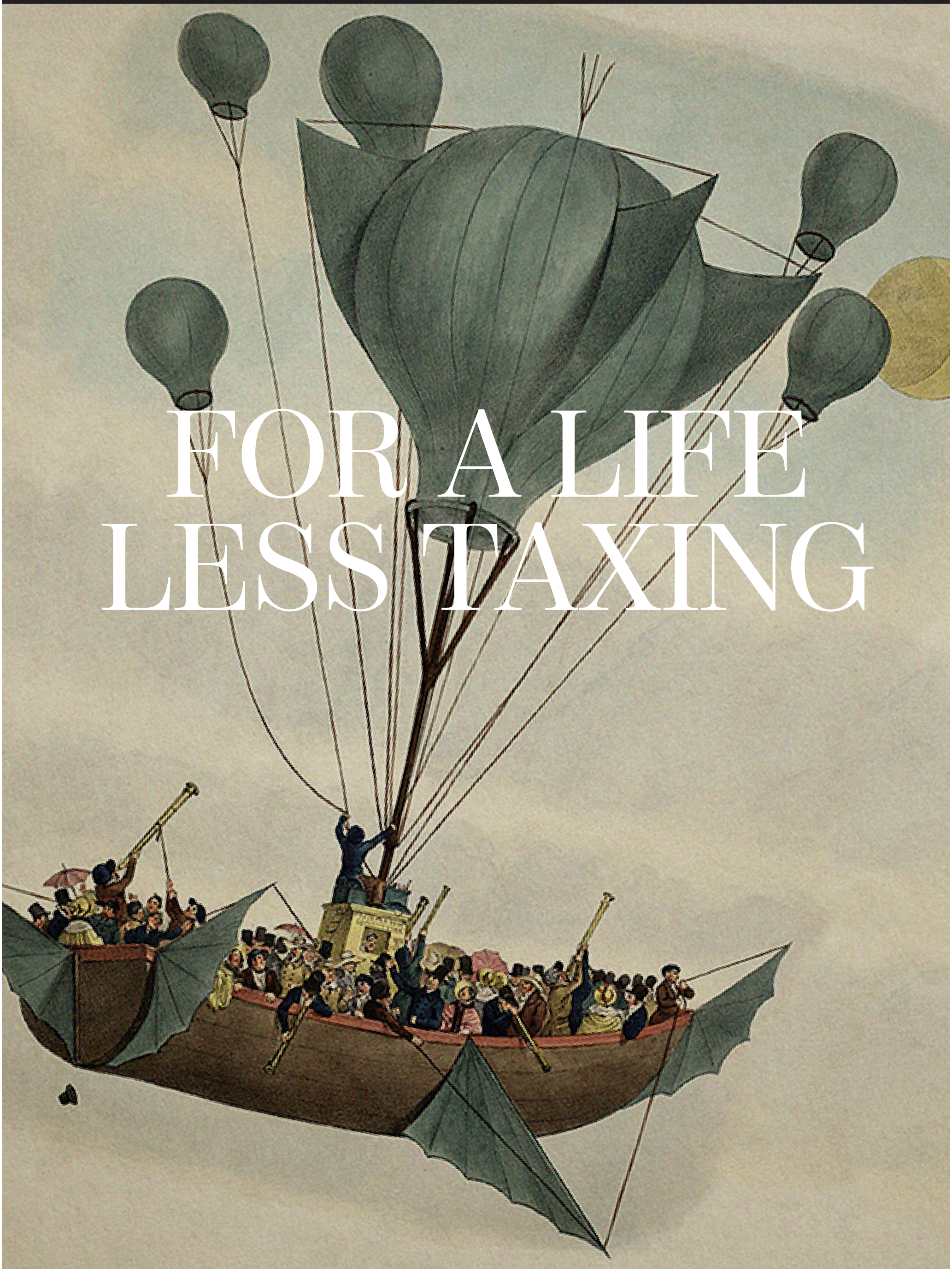
Paradigm Norton | for life

FOR A LIFE LESS TAXING



“I love having a ‘one-stop-shop’ for all my financial service needs. Paradigm Norton always seems to be one step ahead and since I am so busy and short of time, it’s good to have confidence in a service which puts me as an individual at the heart of what they do.”

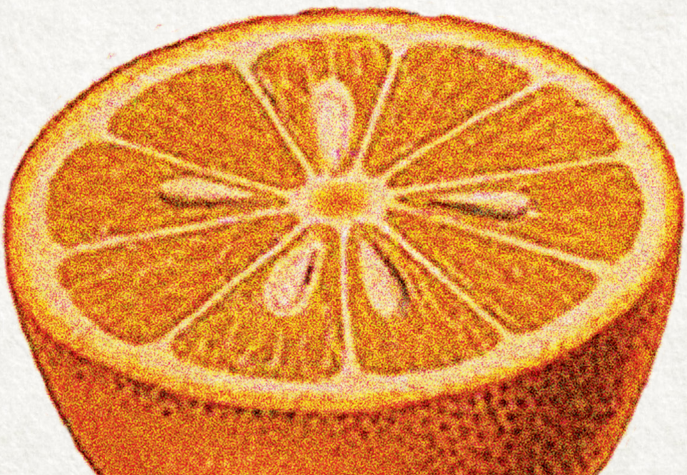
Baroness Elaine Murphy

More segments than you think

At Paradigm Norton we offer a wide range of tax and business services to complement our financial planning and wealth management.

With an increasingly complex tax regime, and with more emphasis being put on taxpayers individual responsibilities, the peace of mind achieved through professional advice and support is invaluable. We can help you optimise your tax position and ensure you meet all your regulatory requirements.

We are able to provide a bespoke tax support service with technical expertise in order to achieve your goals, and, most importantly, take away the burden often associated with tax.



How can we help you?

Tax planning is inextricably linked to your personal financial goals and objectives, you can be assured of a holistic approach to tax at all times. The Tax and Business Services Team have many years' experience and are dedicated to delivering exceptional client service in an increasingly complex tax and business landscape. We offer a comprehensive range of specialist tax services, including strategic tax planning advice, which is tailored to your individual needs. This is designed to complement the cashflow forecasting advice and investment strategy provided by our financial planning colleagues.

Specific areas we can help include:

- Advice on optimising tax reliefs and exemptions, minimising tax liabilities for all personal taxes – income tax, capital gains tax and inheritance tax
- Completion and submission of Self-Assessment tax returns including advice on tax liabilities and payment dates
- Domicile and residence issues
- HMRC enquiries (fee protection scheme available)
- Pension planning
- Preparing Estate and Trust tax returns including liaising with HMRC and executors
- Inter-generational inheritance tax planning
- Tax efficient giving and philanthropic planning
- Statutory accounts, management accounts, VAT and payroll services
- Company secretarial and Companies House reporting requirements
- Corporate tax returns

The benefits of using the Paradigm Norton Tax Team

We feel that by working closely with our financial planning colleagues we can provide a genuine ‘one stop shop’ for your financial needs.

Our clients tell us that:

- The process of dealing with the annual Self-Assessment returns is more straight forward – your Financial Planner already has full knowledge of your overall financial affairs and we liaise closely with them.
- They like the fact that the investment portfolio information (the year-end tax reports, etc) are directly available to us.
- They really appreciate having joint meetings with their tax adviser and financial planner – this saves time and provides a more ‘joined-up’ approach.

We consistently deliver a tailored pro-active tax service to our clients by working with our financial planning colleagues:

- Developing long term relationships with our clients, alongside our financial planning colleagues, so that together, with a multi-disciplined approach we have a deeper understanding of what makes our clients ‘tick’.
- To protect, maintain and enhance our clients’ wealth by working together on strategic tax planning.
- By liaising closely on a real-time basis, we can use each other as sounding boards for tax planning ideas and ‘what if’ scenario planning of all types.
- We can readily estimate the tax liabilities arising from different scenarios and use them in lifetime cashflow projects prepared by our colleagues.
- We offer detailed tax planning and advice from our very experienced tax team who fully understand our clients’ financial circumstances.

Our team

The Paradigm Norton Tax and Business Services Team are a dedicated and highly qualified team (Chartered Tax Advisors, Chartered Accountants or Certified Accountants) with many years' experience in all aspects of personal tax, corporation tax and business services. We work closely with our colleagues in the financial planning team, giving our clients a completely integrated approach to all aspects of their financial affairs.

James Mohide (Chartered Tax Adviser) works closely with our financial planning team to provide a holistic planning approach to a range of high net worth individuals, partnerships and trusts. He provides a broad range of tax services including income and capital gains tax planning and compliance, inheritance tax planning, residence and domicile planning, cash extraction and exit planning; assisting clients to navigate complex legislation and pay the right amount of tax. Clients range from entrepreneurs and owner managed businesses to business executives and non-UK resident / domiciled individuals.

Paul Anning (Chartered Accountant) has 40 years' experience in helping individuals and businesses meet their financial goals. He oversees the delivery of compliance and planning services to private and business clients. Coordinating appropriate specialists, working together with the financial planning team, to meet multi-faceted client needs in today's complicated world.

Tracy Clamp (Certified Accountant) looks after the personal tax affairs of a portfolio of high net worth individuals, ensuring they pay their tax in the most efficient way and benefit from all relevant tax reliefs and exemptions. This includes all aspects of private client taxation, income tax, capital gains tax and inheritance tax and involves liaising closely with the Financial Planners ensuring a holistic approach.

Alison Saunders (Chartered Accountant) specialises in personal tax compliance and planning and also deals with corporate taxation. Her role includes supervising payrolls, company secretarial work and resolving issues that arise. In addition to the above, Alison's role includes capital gains tax, inheritance tax and retirement planning.

George Plumley (Chartered Certified Accountant & Chartered Tax Adviser) deals with end of year accounts for sole traders, partnerships and limited companies, management accounts, payroll, company secretarial work, VAT returns, bookkeeping and tax returns.

Indi Nandha prepares financial accounts for companies, sole traders, partnerships, trusts and estates. She also prepares budgets, cash flow forecasts and monthly management accounts to help clients shape their business decisions. Indi helps clients to set up appropriate accounting systems and provide them with guidance on issues relating to accounts and VAT.

Jan Clark (Chartered Tax Adviser) specialises in income and capital taxes for individuals, entrepreneurs, partnerships, trusts and related family businesses. She is a member of our Estate Planning Committee and enjoys working alongside our Financial Planners, identifying and delivering valuable joined-up thinking, creating solutions which achieve our clients' financial, estate planning and generational goals simultaneously and tax efficiently.

Polly Cockerham (Chartered Tax Adviser) looks after a varied portfolio of personal and trust clients. Dealing with income tax, capital gains tax, small businesses, partnerships, trusts, inheritance tax and other personal tax related matters.

Sue Groves provides administrative support for the Tax and Business Services Team, supporting the personal and corporate tax teams with the annual tax compliance process, ensuring a seamless client service is provided. In addition, she is involved in administering the team's training programme and coordinating the client fee protection service.

"I benefit hugely from having all my advice coming from one source rather than several. For most major investment decisions, there is often a tax angle that can certainly make me structure the investment in certain ways or even make me change my mind because the benefits/problems with tax determine a different decision.

So, I certainly would recommend to people to have the investment advice and tax advice coming from a joined-up team rather than having to spot the linkages themselves. Further the stand-alone tax advice is excellent in its own right!"

Ian Meakins

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