



The ABCDE of what clients want from their tax adviser

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A = Advice on how to avoid or minimise tax

B = Barrier between client and taxman

C = Compliance paperwork

D = Dates tax is payable or repayable

E = Estimates of tax due/recoverable

I conceived this many years ago and continue to refer to it during relevant training and speaking engagements.

The most important thing that clients look for from a tax adviser is obviously **Advice** on how to avoid or minimise tax. **A** does not merely mean providing answers to questions. Clients do not always know the right questions to ask or what information is relevant. So advisers must make sure that they obtain sufficient information before providing advice.

Tax advisers will generally act as a **Barrier** between the client and the taxman.

Tax advisers deal with all the **Compliance** paperwork such as tax returns and statements of account.

Advisers should provide plenty of notice as regards the **Dates** on which tax is payable or on which clients can expect to receive repayments. Payment dates of course are easy under self-assessment; estimating when repayments will be received, less so.

Estimating the tax payable or repayable is another primary responsibility of the tax adviser. The sooner estimates can be provided the better in most cases.

It pays to think of the **ABCDE** whenever writing, calling or speaking with a client.