

Our aim is to delight you.
We want to ensure that you receive fast,
accurate responses to queries so that you can delight your clients.

Our commitments to you are:-

- » We will always be positive in our approach
- » We will deal with you courteously, with professionalism and respect and we will always act ethically and positively
- » We will answer queries and telephone calls, where practicable, within 24 hours
 - » We will keep you updated if there is any material deviation from the above timescale
 - » We will, wherever possible, keep our replies jargon-free and easy to understand
- » We will update you at the earliest opportunity on any material tax news so you can keep your clients informed
 - » We will pay you any fees due within five days of receipt
- » We will help you with relevant activity and make recommendations to generate opportunities within your client base, your firm and through your strategic partners
 - » We will keep you informed of material changes in the tax marketplace and operate continued due diligence on providers and products

Your commitments to us are:-

- » You will treat us courteously, with professionalism and respect and you will always act ethically and positively
- » You will tell us immediately if you're not happy and give us a chance to rectify matters
- » You will advise us of any material changes to your or your client's circumstances
 - » You will encourage your clients to pay all tax fees on time - that way, we can pay you more quickly
- » You'll listen to and, where appropriate, act on our advice and guidance, including but not restricted to the preparation of agreed action plans

"Our mission is to help our members and their clients develop Peak Performing businesses giving them choice and control over their finances, time and lives."

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