

## FEES

Unlike a traditional tax practitioner or accountant we do not charge on a time basis but on a fixed fee for the year. For the completion of a 2017/2018 Tax Return our basic fee is £150.00 + VAT. The more work we have to do the higher the fee. If there is a property schedule to complete the fee starts at £192.50 + VAT. There are a number of other fees in between. We also offer a reduced fee of £102.50 + VAT for dealing with fully retired and partner's Tax Returns (depending on complexity)

We also offer a variety of payment methods. You can pay in full by BACS or Debit Card and we also accept most major Credit Cards. We also accept payment by instalments charged to your credit/debit card usually calculated over a 6 month period. *(Please note a £3 charge is added to the first instalment).*

***PLEASE FEEL FREE TO CONTACT US FOR A QUOTE TO MATCH UP WITH YOUR PERSONAL TAXATION AFFAIRS***

There are a number of occasions when it may be necessary to levy an additional charge, such as:

- (a) Completion of a student grant or loan application form, the fee being £33.33 + VAT.
- (b) Detailed Capital Gains Tax work

**We do however advise on Child/Working Tax Credit free of charge.**

Our fees cover a personal interview, completion and return of your Self Assessment Tax Return to HM Revenue & Customs by secure online filing, checking your tax coding and dealing with any queries from the Revenue on your behalf and if you have any worries or questions someone is always available by telephone.

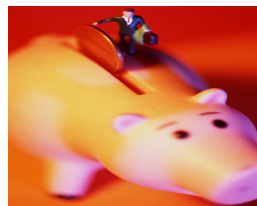
## PREVIOUS YEARS

In our experience clergy who have completed their own Tax Returns in the past have not known what they were eligible to claim for and we generally find that they have been paying too much tax. This can also happen if they have a tax adviser who is not familiar with dealing with the clergy. As part of our service, if you register with us and provide us with a copy of your last Tax Return we can carry out a free "health check". If we find anything wrong we will advise you and, if necessary, submit an amendment on your behalf, and at no cost.

## FINANCIAL ADVICE

We are able to offer Financial Advice through an associated organisation which many of our clients have taken advantage of. In fact, many of the schemes they operate are designed for our clergy clients.

At most of our venues they have a representative with us, they also operate a nationwide service and will only be too pleased to see you in your own home at your convenience.



Peter Chalk & Co is a trading style of Peter Chalk & RPP Taxation Services Ltd.  
Registered in England. Company Number 4551413  
Registered Office: 72 Castlegate, Grantham, Lincolnshire, NG31 6SQ.  
Directors: P R Chalk (FMAAT), Mrs N Argent, J T Serplus, A Roe, Routen Chaplin Ltd

Peter R Chalk is licensed by the Association of Accounting Technicians to provide self employed services in accordance with Licence No 0445, details of which are shown at the address above.

# **Peter Chalk & Co**

Specialists in  
Taxation for the  
Clergy

*(founded by clergy, for clergy)*



**PO Box 6607  
Grantham  
Lincs.  
NG31 7NR**

**Tel 01476 591333  
Fax 01476 577733**

**Email : [enquiries@peterchalkco.co.uk](mailto:enquiries@peterchalkco.co.uk)  
Web : [www.peterchalkco.co.uk](http://www.peterchalkco.co.uk)**

A Trading style of Peter Chalk & RPP Taxation Services Ltd

## ABOUT THE FIRM

This is a long-standing family firm, started by the Rev Frank Chalk over 50 years ago to help the Clergy in Lincolnshire deal with their taxation problems.

Over the years the business has grown and is based in Grantham and managed by Peter Chalk (FMAAT) and Nicola Argent who along with James Serplus and Charlie Blow are the taxation advisors to help local and nationwide Clergy.

We offer a professional and efficient service to over 2200 clients both clergy and non-clergy of all denominations based on a personal knowledge of clergy life.

### WHAT CAN WE DO FOR YOU?

We can take the hard work out of completing your Self Assessment tax return. Once a year we will ask you to fill in one of our forms and ask you to come to an interview at a venue closest to where you live. If you can't come or do not wish to attend an interview, we offer a full postal and telephone interview service. We can also now offer skype or facetime interviews if you prefer. We will complete your tax return, check your coding notice and tax calculation and deal with HM Revenue & Customs on your behalf.

We will also advise you on what you can legitimately claim as expenses of office, and give advice on such things as record-keeping which you are required to do under the Taxes Act.

Our aim is to ensure that you pay the correct amount of tax and receive the correct amount of Tax Credits.

## VENUES

One of the most important aspects of our business is being able to meet our clients personally at an annual interview. During the months of April, May, June and early July we will be visiting a venue near you at an agreed appointment time where we can discuss the intricacies of your individual tax situation.

We feel this in particular appeals to our clients and is one of the strengths of our business to give it the 'personal touch'. We do also offer a full postal and telephone/Skype/FaceTime service if you are unable to attend an interview. The majority of Tax Returns are then completed by the end of October, several months before the 31 January deadline using secure electronic filing to ensure your tax records are updated promptly and any repayments of tax issued to you quicker.

Although it is not always possible, we try to ensure that no-one has to travel too far to reach their appointment.

Our venues are in the following areas:

BEDFORD	BRISTOL
CENTRAL LONDON	CREDITON
DORSET	DURHAM
GLOUCESTER	GRANTHAM
IPSWICH	KENT
LANCASTER	LEEDS
LIVERPOOL	LINCOLN
SLOUGH	NORWICH
OXFORD	PLYMOUTH
SOUTH MANCHESTER	SOUTHAMPTON
STOKE	SWANSEA
WEST MIDLANDS	WEST SUSSEX
WIRRAL	

## LECTURES AND VISITS

We are pleased to give lectures free of charge on any aspects of clergy taxation, Self Assessment and Tax Credits whether it be to colleges or at Deanery Meetings to keep you updated on the many fluctuations in taxation. We feel, and it is proven, that the college students especially are grateful as it prepares them for clergy life.

We have also been invited to run Diocesan Courses for Clergy to explain how to claim correctly for all their entitlements.

Please do not hesitate to contact Peter, Nicola or James by telephone or e-mail for further information and do look at our website for information and taxation updates.

### CHILD TAX CREDITS/WORKING TAX CREDITS

In our experience Clergy do not report their income for tax credit purposes correctly as there are many deductions and reliefs allowable that people are not aware of.

If you feel that this could be you and would like some advice please contact us TODAY and we will give you the professional guidance you need.

### STUDENT LOAN FORMS

As you may be aware Student Finance has changed the way in which you report the income for student loan purposes as this is based on previous years income and the forms have changed. It is now recognised on the main form that you are a Minister of Religion and thus you need to ensure you complete the correct boxes so your child receives the maximum loan they are entitled to.

### CONTACT US FOR FURTHER INFORMATION.