

Dear XXXXXXXXXXXXX

Invitation to a call before filing your Self Assessment return

I am inviting you to have a voluntary telephone call with me before you file your Self Assessment tax return.

If you would like to take part, please contact me to arrange a convenient time for us to speak. You may also authorise a representative to speak with me on your behalf, for example your professional adviser, a friend or relative. If you have already authorised a representative to speak with HMRC, a copy of this letter has also been sent to them.

If you do not wish to take part, you do not need to take any further action.

Why I'm inviting you to a conversation

In WMBC Wealthy, our Customer Compliance Management teams are committed to working cooperatively with you to develop a transparent and trusting relationship.

A call may be helpful if you have complex tax affairs and would like to discuss them before you file your return. For example, we can discuss the following:

- changes in your circumstances or life events that have an impact on your tax affairs
- unusual transactions
- uncertain tax treatments

By having a conversation with a Customer Compliance Manager, you will have an opportunity to provide context to the entries within your return, for the tax year[s 2020/2021 and] 2021/2022.

The benefits of taking part

If I can help you prevent an error before it occurs, you will pay the correct tax at the right time, reducing the risk of incurring interest and penalties.

If you suspect I might take a different view on the tax treatment of a transaction or event, a conversation may help me understand your point of view and I can signpost you to our guidance or explain our clearance services.

I cannot guarantee we won't need to carry out a check after you file your return. But if we do, I hope that by speaking with you beforehand we can reach a resolution sooner.

Please note that I cannot give tax advice, review any tax planning products and our conversation will not replace any existing HMRC services.

If you (or your representative) have any questions, or want to arrange a date and time for a call, please contact me using the details at the top of this letter.

Yours sincerely

XXXXXXXXXX
Customer Compliance Manager
WMBC Wealthy

Direct Dial 03000 XXXXXX

To find out what you can expect from us and what we expect from you go to www.gov.uk/hmrc/your-charter and have a look at 'Your Charter'.