



Dear [Title > Surname from data file](#)

Invitation to a call before sending your Self Assessment tax return

The Wealthy Team are writing to individuals to offer support with their Self Assessment return for the tax year 6 April 2022 to 5 April 2023. I am inviting you to talk with me by phone before you send us your return. This will be voluntary.

Why I'm inviting you to talk with me

I am a Customer Compliance Manager in the Wealthy Team. I am committed to working cooperatively with you, and any representative you authorise, to develop a transparent and trusting working relationship.

You may find this call helpful if you have complex tax affairs and would like to talk about them before you send us your return. For example, we can discuss:

- changes in your circumstances or life events that impact your tax affairs
- areas of tax you would like support with
- entries on your return that you can make clearer by giving us more context

The benefits of talking to me

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

Talking to me may help me understand your point of view. This means I'll be able to support you better and share relevant information and guidance.

I cannot guarantee we will still not need to carry out a check after you send us your return. However, talking with you first means we can hopefully resolve any issues sooner.

I cannot give tax advice or review any tax planning products or arrangements. Our conversation will not replace any of our existing services, for example our clearance services.

If you would like to talk to me

Please contact me using the details at the bottom of this letter. We can then arrange a convenient time for us to talk. You do not need to respond immediately but please keep this letter in case you need to talk about anything in the future.

You can authorise a representative to talk with me on your behalf. For example, your professional adviser, a friend, or a relative. If you have already authorised a representative to speak with us, we have sent them a copy of this letter.

Talking with me is voluntary. If you do not need to speak with me, you do not need to do anything.

Yours sincerely

[CCM name from data file](#)

Customer Compliance Manager

WMBC Wealthy

Direct Dial [Insert telephone number from data file](#)

Email [Insert Email Address from data file](#)

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'.



Corresponding with HMRC by email

Use the following information to decide whether you want to deal with us by email. We take the security of personal information very seriously. Email is not secure, so it's very important that you understand the risks before you email us. We will not deal with you by email unless you tell us you accept the risks of doing so.

About the risks

The main risks associated with using email that concern HMRC are:

- confidentiality and privacy – there's a risk that emails sent over the internet may be intercepted
- confirming your identity – it's crucial that we only communicate with established contacts at their correct email addresses
- there's no guarantee that an email received over an insecure network, like the internet, has not been altered during transit
- attachments could contain a virus or malicious code

How we can reduce the risks

We'll desensitise information, for example by only quoting part of any unique reference numbers. We can also use encryption. We're happy to discuss how you may do the same but still give the information we need.

If you do not want to use email

You may prefer that we do not respond by email, for example because other people have access to your email account. If so, we're happy to respond by another method. We'll agree this with you either by telephone or in writing via post.

If you do want to use email

If you would like to use email as one of the ways HMRC will contact you, we'll need you to confirm in writing by post or email:

- that you understand and accept the risks of using email
- that you're content for financial information to be sent by email
- that attachments can be used

If you are the authorised agent or representative we'll need you to confirm in writing by post or email that your client understands and accepts the risks.

Please also:

- send us the names and email addresses of all people you would like us to use email with - you, your staff, your representative, your agent, for example
- confirm you have ensured that your junk mail filters are not set to reject and/or automatically delete HMRC emails

How we use your agreement

Your confirmation will be held on file and will apply to future email correspondence. We'll review the agreement at regular intervals to make sure there are no changes.

Opting out

You may opt out of using email at any time by letting us know.

More information

You can find more information on HMRC's privacy policy. Go to www.gov.uk and search for 'HMRC Privacy Notice'.