Tax Questions & Records

Organise information for a discussion with the appropriate qualified tax adviser.

1. Business activity and period concerned

2. The question you need answered

3. Relevant records and correspondence available

4. Missing information and who can provide it

5. Previous advice or decisions to share with the adviser

6. Next action, responsible person and review date

Planning aid only. This is not a statutory form or professional tax, legal or accounting advice.

Use a summary for an initial enquiry. Share sensitive records only through agreed arrangements.