

Confirmation of Tax Investigation Service

Hall Livesey Brown (Tarpoley)

POLICY NUMBER CRT22871-2026-1

PERIOD OF SERVICE 01 September 2026 to 31 August 2027

What does the tax investigation service include?

Your accountant is insured in respect of fees up to £100,000 incurred representing you in the event of any compliance check, visit or investigation started by HMRC regarding compliance with:

Corporation Tax Self-Assessment	National Insurance	VAT
Income Tax Self-Assessment	Construction Industry Scheme	National Minimum Wage
PAYE and P11D	IR35	Gift Aid legislation and regulations
Capital Gains Tax	Inheritance Tax	Stamp Duty (including Land Tax)

What is excluded?

Fraud	Criminal Prosecutions	Tax Avoidance Schemes
Deliberate Omissions	Tax, fines, penalties & interest due	Enquiries commencing outside of the Period of Service

Making a claim

In the event of any correspondence or communication from HMRC relating to a potential enquiry or dispute, please speak to your accountant straight away and get immediate professional advice. Your accountant will make a claim against their policy and credit the proceeds against your liability for fees. You could be liable for any fees not covered by the policy.

Support for your business

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This document does not give full details of the cover provided. A condition of your accountant with the Insurers is that all claims must occur and be notified during the Period of Insurance. This service only applies to enquiries or disputes with HMRC, whose jurisdiction is within the United Kingdom of Great Britain and Northern Ireland excluding the Isle of Man and Channel Islands.