PRIVATE TAX ADVISORY

A better way to deliver important tax documents

Documentd adds a permanent delivery layer to the communications tax advisers already use, reducing cost and complexity while giving clients their own long-term copy.

WHERE DOCUMENTD FITS

Use Documentd for the tax documents clients need to keep

Documentd is not for everyday questions, information gathering or work still in progress. It is designed for completed, point-in-time documents that clients may need to retain, review or retrieve years later.

- Filed tax returns
- Final tax computations
- Capital gains calculations
- Tax advice reports
- HMRC correspondence
- Inheritance tax documents
- Other important completed tax records

Use email for communication. Use the client portal for active tax work and collaboration. Use Documentd when the client should receive their own permanent copy.

Illustrative savings assume around four important documents per client each year. Actual savings depend on the type of tax work, client profile, volumes, existing processes and costs.

LONG-TERM CLIENT RECORDS

Tax documents can remain important for many years

A tax engagement may relate to one return, transaction or planning exercise, while the documents it produces can remain useful long afterwards. Clients may need them for future returns, HMRC enquiries, borrowing, transactions, estate planning or simply as a record of their financial affairs.

Personal to the client
The document is delivered directly to the individual client.

Accessible later
The client retains long-term access independently of the adviser's portal.

Reliable historic copy
The sender cannot alter the settled copy.

DOCUMENTD IN PRACTICE

- ✓ The client owns their copy
- ✓ The sender cannot alter the settled copy
- ✓ The sender cannot delete the settled copy
- ✓ Access continues after the tax engagement has ended
- ✓ The original document can be downloaded again
- ✓ Evidence of what was delivered and when is retained

CONSUMER DUTY

It gives clients a clearer tax record

Completed tax documents often form part of a client's long-term financial history. Documentd gives those records a persistent, organised place where clients can review and retrieve them independently of the adviser who originally prepared the work.

Give the client their own permanent tax record, rather than making long-term access depend on the adviser's systems.

01

IF YOU CURRENTLY USE A CLIENT PORTAL

Keep the portal focused on active tax work.

Client portals are built for collecting source information, questionnaires, document exchange, draft review and approvals while tax work is in progress. Using the portal as the client's permanent tax archive means extending retention, former-client access, authentication, migration controls and support long after the original engagement has ended.

A few pounds
indicative annual saving per client
From avoiding permanent archive requirements, legacy access and associated portal support.

CURRENT APPROACH

Making the portal the permanent copy creates a long-term infrastructure obligation

- Completed tax records need to remain available long after the active work has finished
- Former clients may need historic documents after changing adviser
- Authentication, password recovery and customer support have to remain available for legacy users
- Retention, audit and administrative controls become part of the portal architecture
- Historic client accounts extend the identity-management and cyber-security burden
- Portal migrations and replacements have to preserve access to old documents
- Changes to practice-management systems can complicate access to historic engagements
- The adviser remains responsible for maintaining the entire access environment

ADD DOCUMENTD

Give clients their own permanent tax record with Documentd

Keep the portal focused on secure collaboration while tax work is active. Documents can still appear there for convenience, but Documentd separately delivers the finished record into the client's own long-term account. Access to completed tax documents no longer has to depend on maintaining an old adviser portal relationship.

- ✓ Keep the portal focused on active tax work and collaboration
- ✓ Avoid building permanent-document requirements into the portal
- ✓ Reduce former-client authentication and support
- ✓ Reduce the long-term security burden of historic portal accounts
- ✓ Separate permanent document access from future portal migrations
- ✓ Give clients access independently of the adviser's systems

Use Documentd for the permanent tax record clients keep, and the portal for active tax work.

LONG-TERM RECORD BENEFIT
Give clients their own accessible historic tax record without making continued access to important documents depend entirely on the adviser's live portal infrastructure.

CLIENT-SERVICE BENEFIT
Clients retain important tax records when an engagement ends, circumstances change or they move to another adviser.

COST BENEFIT
A few pounds per client each year can be saved by avoiding unnecessary development, maintenance, legacy access and support.

02

IF YOU CURRENTLY USE EMAIL

Keep the email. Give clients a better long-term service.

Email is effective for questions, reminders and everyday communication. But completed tax documents become mixed into the client's inbox, leaving the client responsible for identifying, storing and finding records they may need again years later.

Around 20p
indicative annual saving per client
Assuming around four important documents a year and a low level of document-related client-service contact.

CURRENT APPROACH

Email delivers the document, but leaves the client to manage it

- Completed tax documents are mixed with everyday correspondence
- Clients must identify which attachments they need to retain
- Historic returns, calculations and advice can become difficult to find
- Clients may contact the adviser for replacement copies
- Old email accounts, deleted messages and changed addresses can make retrieval harder
- Important records may be needed years after the original tax work was completed

ADD DOCUMENTD

Add Documentd alongside email

Keep the existing email communication. Documentd also places the completed tax document into the client's own organised Keepd account, where it remains available for future review and retrieval.

- ✓ Existing email communication can remain unchanged
- ✓ Important tax records are separated from everyday messages
- ✓ Clients can review historic documents again later
- ✓ Clients can retrieve copies themselves
- ✓ Fewer historic-document and resend requests
- ✓ A better long-term client-service experience

Better long-term client service and lower support cost, without replacing email.

RECORD-KEEPING BENEFIT
Tax records can remain relevant for future filings, transactions, enquiries and financial planning. Giving clients a persistent, organised place for completed documents reduces reliance on old correspondence.

CLIENT-SERVICE BENEFIT
Clients can find and retrieve important tax documents themselves instead of searching old emails or asking their adviser to resend them.

COST BENEFIT
Around 20p per client each year in illustrative servicing savings, with greater value where historic-document requests are common.

03

IF YOU CURRENTLY USE POST

Phase out paper where electronic delivery is appropriate.

Paper gives the client something physical to keep, but every delivery carries printing, fulfilment and postage costs and leaves the client with another tax record to file and store.

Around £4
indicative annual saving per client
Based on around four posted documents per year. Postage alone is around this level before printing and fulfilment.

CURRENT APPROACH

The physical delivery process

- Printing
- Paper and envelopes
- Folding and inserting
- Fulfilment
- Postage
- Returned mail
- Address changes
- Replacement copies
- Client paper filing and storage

WITH DOCUMENTD

Replace post with Documentd

Where electronic delivery is appropriate, phase out routine physical post and give the client their own permanent electronic copy instead.

- ✓ No printing
- ✓ No fulfilment
- ✓ No postage
- ✓ Immediate electronic delivery
- ✓ Documents remain organised in one place
- ✓ No paper filing burden for the client

Keep the permanent record, lose the cost and inconvenience of paper.

LONG-TERM RECORD BENEFIT
Move routine completed-document delivery from paper to a long-term electronic model while still giving the client their own accessible copy.

CLIENT-SERVICE BENEFIT
Clients avoid unnecessary paper filing and can retrieve important tax records electronically whenever they need them.

COST BENEFIT
Around £4 per client each year can be available from postage alone, with printing and fulfilment savings on top.

THE BUSINESS CASE

Add Documentd where permanent delivery matters

Portal
Keep it for information exchange, review and approvals while tax work is active. Reduce the burden of making it the client's permanent archive.

Email
Keep using it for communication. Improve long-term client service and reduce historic-document requests.

Post
Phase it out where appropriate and remove unnecessary printing, fulfilment, postage and paper-filing costs.

Documentd does not ask you to replace systems that already work. It adds a permanent delivery layer that can reduce cost and complexity while giving clients a better long-term service.

Documentd

Documentd adds a purpose-built permanent delivery layer to the systems tax advisers already use, reducing cost and complexity while giving clients better long-term access to important tax records.

BUSINESS CASE
documentd.com/business-cases/private-tax-advisory

COMMUNICATION GUIDE
documentd.com/industries/private-tax-advisory

Illustrative savings assume around four important documents per client each year. Email savings use a low level of document-related client-service contact and an average inbound-call cost of approximately £6. Post savings use current retail Second Class postage as an indicative benchmark; business mailing rates vary. Portal savings are illustrative and depend on architecture, scale and existing capabilities. Regulatory summary is a practical overview rather than legal advice.