

PRIVATE TAX ADVISORY

Deliver important tax documents clients can always find

A practical guide to choosing the right approach for private client tax communications, from reminders and information requests to important tax records clients may need to keep for many years.

A COMPLETE APPROACH TO CLIENT DOCUMENTS

Different documents do different jobs

Tax and practice management systems, email and messaging, client portals and Documentd each serve a different purpose. The right choice depends on the job: preparing and managing tax work, communicating with the client, exchanging information and obtaining approvals, or permanently delivering an important record the client should retain. Using each in the right way creates a better client experience and reduces avoidable requests for historic documents.



PRIVATE TAX IN PRACTICE

Choose the right approach for each communication

Client portals are the right place for exchanging source information, reviewing work and approving submissions. Email and messaging handle reminders, questions and everyday communication. Documentd is designed for completed tax returns, calculations, advice and other important point-in-time records clients may need to retain for many years. Using each appropriately gives clients a clearer record of their tax affairs and reduces avoidable requests for historic documents.

Email & messaging

COMMUNICATE

Best for reminders, questions and communications whose value is mainly immediate.

- Filing deadline reminders
- Requests for information
- Payment reminders
- Meeting reminders
- General updates

Client portal

EXCHANGE & APPROVE

The right place for secure collaboration while tax work is in progress.

- Source document uploads
- Tax questionnaires
- Draft return review
- Electronic approvals
- Outstanding information

Documentd

DELIVER & RETAIN

For completed tax documents and advice clients should keep.

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



Important tax documents should stay with the client. Documentd delivers permanent, client-owned copies into each client's own private document home, where they remain easy to access and find again long after the original tax work was completed.

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SECURITY & TRUST

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