



Coll & Co

The Tax Specialists

HOURLY CONSULTATION SERVICE

INDEPENDENT FINANCIAL AND TAXATION ADVICE

We are pleased to announce details of our new Independent **Financial and Taxation** Advisory Service.



Meetings

These One-to-One meetings are intended to provide a forum for discussion of specific tax and financial issues related to your financial situation. They can be done by phone or in person at their offices in Galway.



Our Fees

Our standard fees for an initial one hour consultation is €250 plus VAT for VAT registered businesses payable by cash or card in advance or on the day. If you engage our services (within 4 weeks) as a result of the items discussed during the consultation, the initial fee will be offset against any subsequent tax filing fees where a tax return has to be prepared and filed.

Our fee includes an initial review of the Fact Find that you have completed but does not allow for research on complex tax or other matters. Should you wish a report or draft calculations to be undertaken, we are happy to quote for that separately.



Pre-work

Please complete the attached Coll & Co Fact Find and Coll & Co Tax Checklist and preferably return to us ahead of your meeting. Please also bring along any other relevant documentation on the day to the meeting.

Contact Coll & Co directly.

Pier Road, Barna Village, Galway
T: + 353 (0)91 592080 | E: rcoll@coll.ie | www.coll.ie



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TAX SERVICE & OUR EXPERTISE

At Coll & Co we provide a full personal and corporate tax service including compliance, planning and negotiating with the Revenue Commissioners on your behalf. Some of the key tax issues which we can help with include:

Income Tax

- Calculation of tax liability and submission of annual tax returns to Revenue
- Minimise your liability through effective tax planning
- Advice in relation to allowances and tax reliefs available
- Liaising with Revenue on your behalf

Pension Advice / Financial Health Check

- Review Pension options in conjunction with pension advisers
- Assess optimal pension structure for clients as part of a comprehensive review of financial position
- Comparison of pension schemes e.g. self directed pension scheme, PRSA, pension backed mortgages and other private pensions

Capital Acquisitions Tax (CAT) & Tax Efficient Wills

- Provide advice in relation to reliefs available, including Agricultural Relief and Business Property Relief
- Inheritance planning to maximise wealth preservation for the next generation and advise on tax implications of current Will, etc
- Detailed review by our legal consultant who specialises in drafting tax efficient wills

Residence / Domicile Issues

- Assess your residential status and advice on all aspects of residence and domicile. This service will include tax planning to minimise the Irish tax liability arising on foreign income or gains and assess the availability of the remittance basis of taxation

Capital Gains Tax (CGT)

- Preparation of Capital Gains Tax computations and advice on various reliefs available
- Planning in advance of disposals to maximise tax reliefs as part of our client's overall Estate Planning strategy

Redundancy Issues

- Provide advice in relation to the tax treatment of proposed redundancy package
- Calculate employee's entitlement to statutory redundancy and tax exemptions due in relation to taxable lump sums
- Advice in relation to top slicing relief

Corporation Tax

- Completion of annual tax returns, advice on tax payments and tax shelters
- Provide advice in relation to Close Company issues, use of losses etc

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Coll & Co are a firm of independent financial and tax advisors based in Barna, Co. Galway

We provide services to the PAYE individual, company directors and the self-employed. We are independent financial advisors with no ties to any particular insurance, mortgage or investment company and can, therefore, we offer the best advice to suit an individual client's needs.

All of Coll & Co's staff are fully qualified members of professional bodies such as the Irish Taxation Institute or Chartered Accountants Ireland and have significant experience, having being previously employed by one of the "Big 4" accounting firms, such as KPMG and E&Y.

The following are the key personnel who will be providing the service:



Rory Coll

Rory is the principal partner. He is a Fellow of the Institute of Chartered Accountants with in excess of 20 years of broad-based experience in Ireland and overseas.

Rory both trained and worked a manager for several years in the KPMG Galway office, providing audit and business advice to many multinational and local companies in the region. He also worked on a two year assignment with KPMG Boston, USA and also in Hungary. He then moved into industry, holding a number of senior financial positions in both Ireland and the USA before establishing his own tax and business advisory practice in Barna.

He is a regular contributor on taxation and pension matters to publications such as the Sunday Business Post, Business Plus magazine and also writes a bi-weekly article on current taxation matters for the Galway Advertiser.



Sheena McGrath

Sheena is both an AITI Chartered Tax Advisor and a Fellow of the Institute of Chartered Accountants in Ireland.

She has in excess of 18 years experience providing advice in relation to all tax matters to corporate and tax clients having previously worked as a member of the management team with Ernst and Young tax group in Galway, where she managed the tax affairs for both individuals and companies in the region.

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Engagement Limitations

We will base our review on the information which you make available to us both verbal and written. We will rely on the information supplied by you without audit or verification. We will assume that all information supplied is accurate and reflects your good faith efforts to describe matters relating to the tax or financial issue as of the date of the meeting.

The advice provided at the meeting is our best understanding of the legislation in place as of the date of the meeting. However it is not intended to be relied upon to proceed with any actions that may give rise to a tax or other liability without you instructing Coll & Co to provide written advice on the matter before you proceed. Coll & Co will then issue a formal engagement letter setting out the scope of the assignment and the fees for your prior approval. Coll & Co accepts no liability or responsibility to anyone for the information provided verbally on the day of the meeting until a signed engagement letter is in place.



Client Acceptance

We confirm that we have read and understood the contents of this information leaflet.

We agree that it accurately reflects my understanding of the services we have engaged you to provide and accept the terms and conditions on which they are to be provided.

Signed _____

Date / /

Signed _____

Date / /

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