BBX TAX QUESTIONS

# The 2-Page Sanity-Check Checklist

## Gather the right facts. Test the scope. Ask a question that gets a useful answer fast.

**A useful tax response begins before the question is sent.** Tax often turns on a date, amount, relationship or document that appears minor but changes the answer. Use this checklist to reduce delay and help the tax team focus its research on what matters.

## 1 Gather the facts first

*You do not need to know the tax law. You do need to describe what happened - or what you are considering - accurately.*

| | |
|---|---|
| **WHO IS INVOLVED?** | |
| **[ ] Taxpayer and capacity** | Individual, director, shareholder, employer, company, partnership, trust or estate. |
| **[ ] Other parties** | Spouse, family member, connected company, employee, customer, supplier or overseas party. |
| **WHAT HAPPENED - OR MAY HAPPEN?** | |
| **[ ] Action or transaction** | What has been done or proposed? Keep this factual and chronological. |
| **[ ] Dates and tax year** | When did it happen? Is there a decision, filing or payment deadline? |
| **[ ] Amounts and ownership** | Purchase price, value, income, cost, percentage ownership and who paid or received it. |
| **[ ] Purpose** | What business, personal or family objective are you trying to achieve? |
| **WHAT EVIDENCE EXISTS?** | |
| **[ ] Documents** | Contract, invoice, agreement, calculation, HMRC letter, accounts, return or relevant correspondence. |
| **[ ] Earlier action or advice** | What has already been filed, claimed, paid or advised - and by whom? |

## 2 Run the 30-minute scope test

*Each credit covers one tax question requiring no more than 30 minutes of research. This test is a guide, not a guarantee of scope.*

**LIKELY TO FIT**

- [ ] One clear UK tax issue
- [ ] Key facts and dates available
- [ ] General rule and next step sought
- [ ] No substantial document review

**MAY USE MORE CREDITS**

- [ ] Several separate tax issues
- [ ] Different people or transactions
- [ ] More than one outcome requested
- [ ] Question needs splitting into parts

**LIKELY TO NEED A QUOTE**

- [ ] Bespoke calculations or modelling
- [ ] Detailed documents or history
- [ ] Formal advice or HMRC representation
- [ ] Personalised report for action

*Important: a multi-part enquiry may be divided into separate questions and use more than one credit. If the research is likely to exceed 30 minutes, you will be told within the normal service timeframe and offered a quotation before further work begins.*

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# Write the question so the decision is clear

The tax team should be able to see who you are, what happened, what you need to know and why the answer matters.

## 3 Use this question formula

**THE QUESTION FORMULA**

I am **[who and in what capacity]**. On **[date]**, I did/am considering **[one transaction or action]** involving **[amount and parties]**. I want to know **[one precise tax point]** so that I can **[make a decision]** by **[deadline]**.

**BEFORE AND AFTER**

| | |
|---|---|
| TOO BROAD | *Can my company pay for things for me without tax?* |
| USEFUL | I am the sole director of a UK limited company. In September 2026, the company plans to pay a £1,200 annual professional subscription that I also use personally. Is the payment deductible for the company and will it create a benefit in kind for me? I need to decide before 25 September. |

## 4 Make one question do one job

*A focused question is quicker to assess, easier to research and less likely to depend on assumptions nobody has stated.*

**BEFORE YOU PRESS SEND**

[ ] One main question is clearly stated
[ ] Names, roles, dates and amounts are included
[ ] Relevant documents are attached or described
[ ] What you want to decide is explained
[ ] Any deadline is stated

**SPLIT THE QUESTION WHEN**

[ ] It covers more than one transaction
[ ] It asks about several different taxes
[ ] It concerns different people or companies
[ ] Each part could stand alone as a question
[ ] Different assumptions produce different outcomes

## 5 Know when general guidance is not enough

**The question service provides general UK tax guidance and may use your circumstances to explain the principles.** It is not a personalised tax opinion on which you should act without consulting your accountant or commissioning formal advice where the facts matter.

A separate quotation is likely where the work requires detailed calculations, substantial document review, transaction structuring, an HMRC response, a formal opinion or a personalised report. Consultancy is scoped after the relevant information is received, peer reviewed, covered by professional indemnity insurance and includes a 30-minute clarification discussion with the relevant tax-team member.

**READY TO ASK?**

Book the free 15-minute introductory call, accept the terms and submit your first question through the portal.

**5 QUESTIONS**
**100 BBX pounds + VAT**
Response within 3 working days

Covers UK taxes. Excludes grants, tax-credit schemes and specialist incentive claims such as film tax credits. Credits do not expire. Questions may be submitted for another person or business through the purchasing member's account, subject to clear disclosure and appropriate authority.

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