

CLIENT CATEGORIES EXPLAINED

| CLIENT CATEGORY | INCLUDED | EXCLUDED | FEE TYPE |
|--|--|---|--|
| <p>Business with annual turnover above £25M</p> <p>Including Charities with total income resources above £25M.</p> | <p>Personal tax return of the Directors, Director's spouse, Co Secretaries & their spouse (inc Civil & Common Law) if you are the tax return agent.*</p> | <p>Personal tax returns if: Annual GROSS income on the Land & Property pages is £50k or above.</p> <p>Any part of the Self Employment pages are completed. In both cases a Separate Sole Trader policy will be needed.</p> | <p>Bespoke Individual Company Fee will be given annually which will require you to complete a 'Larger Company proposal form'.</p> |
| <p>Businesses with annual turnover above £10M.</p> <p>Including Charities with total income resources above £10M.</p> | | | <p>Higher than Standard Fee, due to Auditing and Turnover making it a higher risk. (No proposal form is required, however, the Company name is.)</p> |
| <p>Limited Companies with an annual turnover up to £10M.</p> <p>Including Incorporated Charities with total income resources up to £10M.</p> | | | <p>Standard Limited Company Fee.</p> |
| <p>Partnerships including LLPs with an annual turnover up to £10M.</p> | | | <p>Standard Partnership Fee.</p> |
| <p>Sole Traders with an annual turnover up to £10M.</p> | <p>Sole Traders, Trading Charities & Trusts</p> | | <p>Standard Sole Trader Fee.</p> |
| <p>Private Clients</p> | <p>Personal tax returns</p> | <p>Personal tax returns if: Annual GROSS income on the Land & Property pages is £50k or above.</p> <p>Any part of the Self Employment pages are completed. In both cases a Separate Sole Trader policy will be needed.</p> | <p>Standard Private Client Fee</p> |
| | <p>Non trading Charities & Trusts</p> | | |

* See Exclusions