Quotation proposal document.

AbbeyTax
Insurance Services

Please complete this form and return to us on the details provided below for your bespoke quotation.

Practice name _____

Contact name _____ Position _____

Address _____

_____

_____ Postcode _____

Telephone _____ Fax _____

Email _____

About your practice

Number of partners _____ Number of offices _____ Total number of staff _____

Does the practice hold a probate licence? ☐ No ☐ Yes

Does the practice have any particular specialism? ☐ No ☐ Yes _____

Are you regulated for general insurance? ☐ No ☐ Yes ☐ Category A 19 FCA authorised ☐ DPB licensed

If so, do you have professional indemnity insurance of at least €1,120,200 per claim and €1,680,300 in the aggregate? ☐ No ☐ Yes

Do you currently have a Fee Protection Insurance scheme? ☐ No Yes, my renewal date is _____

Who is your current provider? Please select What is your current scheme? Please select

Your charge out rates

Please provide hourly charge out rates for staff that will deal with the nvestigations and Disputes.
(Please note that these will be fixed for the Period of Insurance)

Partner _____ Manager _____ Other _____

Tax senior _____ Audit senior _____

Client numbers

Please provide an approximate breakdown of your client numbers below:

	Total	Subscribing to scheme
Limited companies		
Partnerships		
Sole traders		
Directors/Partners		
Personal tax		
Trusts		
Other		

Do you require a quote for

☐ **All Client scheme** - This covers all the clients of your practice

☐ **Client Decide scheme** - This covers only those clients that opt to subscribe

☐ **Both** so that I can compare which one is most suitable

Your enquiry summary

Where you have an existing scheme in place and wish to continue on the same basis, then **please provide a copy of your claims history from your existing provider**. This will negate the need to complete the investigation history.
Please provide a summary of Enquiries which have started in the past three years:

1. Include the full costs of the cases prior to any discount or waiver; where the Enquiries/Disputes are not yet settled, please include an estimate in respect of the likely fees to conclusion.
2. Allocate all costs to the year the Enquiry/Dispute commenced.
3. Please indicate any unusual or exceptional cases.
4. Do not include costs in respect of clients who have joined the practice with ongoing Enquiries/Disputes.
5. Do not include costs related to Enquiries arising from Fraud Investigation Service.

Investigations history on total client base

Required for 'All Client' quotes and/or brand new schemes.

		Year one (Last 12 months)	Year two	Year three
Self Assessment Full Enquiries	Total number			
	Total cost			
HMRC VAT Disputes	Total number			
	Total cost			
Employer Compliance Disputes	Total number			
	Total cost			
Self Assessment Aspect Enquiries	Total number			
	Total cost			
Schedule 36 Pre Disputes including National Minimum Wage	Total number			
	Total cost			
IHT Enquiries	Total number			
	Total cost			

Investigations history on subscribing clients

Only required for 'Client Decide' quotations where there is an existing 'Client Decide' scheme in place, or simply provide claims history from your existing provider.

		Year one (Last 12 months)	Year two	Year three
Self Assessment Full Enquiries	Total number			
	Total cost			
HMRC VAT Disputes	Total number			
	Total cost			
Employer Compliance Disputes	Total number			
	Total cost			
Self Assessment Aspect Enquiries	Total number			
	Total cost			
Schedule 36 Pre Disputes including National Minimum Wage	Total number			
	Total cost			
IHT Enquiries	Total number			
	Total cost			

Signature _____ Print name _____ Date _____

The information contained within this document will be treated in the strictest confidence and will form the basis of the quotation provided.

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