



CHECKLIST

32 WAYS TO EXTRACT MAXIMUM VALUE FROM A BUSINESS ADVISOR:

TAX ADVICE AREA

CHECK

SALARY & DIVIDENDS

Salary

Employing spouse, civil partner or family member

Dividends

Giving shares to family members

PENSIONS

Registered pension schemes

LOANS

Loaning money to the business and employee loans



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BUSINESS ASSETS

Renting personal assets to the business

Personal use of company assets

EMPLOYEE BENEFITS

Life insurance

Pensions advice

Mobile Phones

Anything except cash that costs less than £50

Staff functions

Employee car parking

Training



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OTHER TAX EFFICIENT BENEFITS

Lunches & snacks

Childcare support

Bikes & equipment cycle to work scheme

Onsite gym & sporting facilities

Taxable benefits still worth considering

Company cars

Charging electric vehicles

Running costs for company owned vehicles

Additional items for company owned cars



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TAX ADVICE AREA	CHECK
BUSINESS EXPENSES PAID FOR PERSONALLY	
Home working expenses	<input type="checkbox"/>
Mileage claims	<input type="checkbox"/>
Congestion charge - company car	<input type="checkbox"/>
Business travel	<input type="checkbox"/>
Subsistence & entertaining	<input type="checkbox"/>
Music, Audio book & Amazon Prime subscriptions	<input type="checkbox"/>
Points rewards cards	<input type="checkbox"/>
School & University fees planning	<input type="checkbox"/>