

Year-End Checklist

Follow our simple year end checklist to ensure that you are maximising the effectiveness of tax saving opportunities.

1

Make full use of 2021/22 ISA allowances



2

Maximise available allowances across the family



3

Ensure you are extracting profits from your business tax-efficiently



4

Find out how the timing of dividends and bonuses could reduce your tax bill



5

Discuss ways of improving your cashflow



6

Put in place a tax-efficient gifting strategy



7

Review and update your pension arrangements



8

Re-examine your estate plan and Will



9

Send your business and personal records to your accountant in plenty of time



Do get in touch should you need any help with your year-end planning.

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CHARTERED ACCOUNTANTS