

**CROSSLEY & CO CHARTERED ACCOUNTANTS**

**SCHEDULE 13 – SPECIALIST OR AD HOC TAXATION ADVISORY SERVICES**

This schedule should be read in conjunction with the engagement letter and the terms of business.

**1 RESPONSIBILITIES AND SCOPE IN RELATION TO .....insert name of TRANSACTION OR project.**

**1.1 COMPLIANCE WORK**

- 1.1.1 [We will provide ad hoc tax advisory services as requested by you from time to time] [We will provide tax advisory services in relation to [eg, the sale of your shareholding in Xyz Co]].
- 1.1.2 Our services may include telephone conversations, attendance at meetings and written advice, as and when requested by you.
- 1.1.3 We will not provide any other tax services unless covered by a separate engagement letter or another schedule to this letter.
- 1.1.4 If additional or specialist expertise is required, we may need to seek this from, or refer you to, a specialist.

**1.2 CHANGES IN THE LAW, IN PRACTICE OR IN PUBLIC POLICY**

- 1.3
- 1.3.1 We will not accept responsibility if you act on advice given by us on an earlier occasion without first confirming with us that the advice is still valid in the light of any change in the law, practice, public policy or in your circumstances.
- 1.3.2 We will accept no liability for losses arising from changes in the law (or the interpretation thereof), practice or public policy that are first published after the date on which the advice is given.

**1.4 YOUR RESPONSIBILITIES**

- 1.4.1 You agree to provide full information necessary for us to advise in relation to your affairs. We will rely on the information and documents being true, correct and complete and will not audit the information or those documents.
- 1.4.2 If you require tax advice in relation to a proposed transaction, we recommend that you instruct us sufficiently in advance so that we have time to give properly considered advice before the transaction takes place.
- 1.4.3 You authorise us to approach such third parties as may be appropriate, for information that we consider necessary to provide the advice.
- 1.4.4 You will keep us informed of material changes in your circumstances that could affect the tax advisory services we are providing. If you are unsure whether the change is material, please let us know so that we can assess its significance.