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1. TAX PHILOSOPHY STATEMENT

1.1 At Portt & Co, we are committed to maintaining the highest standards of transparency, integrity, and ethical conduct in all our tax practices. Our philosophy is centered around ensuring that our clients comply fully with UK tax legislation while benefiting from all available tax reliefs. We recognise that in addition to the huge value businesses create to society through innovation and job creation, a healthy society depends upon the taxes paid by businesses and all businesses should contribute fairly.

2. COMPLIANCE AND INTEGRITY

2.1. We believe in the importance of compliance with all applicable tax laws and regulations. Our approach is to provide our clients with clear, accurate, and timely advice to help them meet their tax obligations. We ensure that all tax filings are completed accurately and submitted on time, minimizing the risk of penalties and interest.

3. MAXIMISING TAX RELIEFS

3.1. While compliance is our priority, we also strive to ensure that our clients benefit from all available tax reliefs. We proactively identify opportunities for tax savings and provide strategic advice to optimise our clients' tax positions. This includes advising on allowable deductions, credits, and other reliefs that can reduce the overall tax burden.

4. TRANSPARENCY AND ACCOUNTABILITY

4.1. Transparency is at the core of our tax philosophy. We maintain open and honest communication with our clients, providing them with a clear understanding of their tax positions and the rationale behind our advice. We are committed to full disclosure and ensure that our clients are aware of any potential risks and benefits associated with our tax strategies.

5. ETHICAL CONDUCT

5.1. We adhere to the highest ethical standards in all our tax practices. We do not engage in or promote aggressive tax avoidance schemes. Our goal is to help our clients achieve tax efficiency in a manner that is consistent with the spirit and letter of the law.

6. ALIGNMENT WITH B LAB'S FRAMEWORK

6.1. Recognising the judgment involved in applying the above guidance for company-specific tax strategies, as well as the complexity involved in evaluating the specific tax strategies applied by all clients of a tax advisor, we ensure that our tax philosophy aligns with the principles contained in B Lab's framework. The taxes paid over time by our clients are representative of their actual income and operations in each jurisdiction. We also acknowledge that our own engagement with governments and tax regulators aligns with this philosophy.

7. PROCESSES FOR COMPLIANCE

7.1. We have processes in place to manage and maintain compliance of our services, recommendations, and government and tax regulator engagement with our tax philosophy. This ensures that our practices are consistent with our commitment to transparency and ethical conduct.

8. CONTINUOUS IMPROVEMENT

8.1. We are dedicated to continuous improvement and staying up-to-date with changes in tax legislation and best practices. Our team regularly participates in professional development and training to ensure that we provide the most current and effective tax advice to our clients.

9. CLIENT-CENTRIC APPROACH

9.1. Our clients are at the heart of everything we do. We take the time to understand their unique needs and circumstances, providing personalised tax advice that aligns with their business goals. We are committed to building long-term relationships based on trust, transparency, and mutual respect.

10. MONITORING AND REVIEW OF THE POLICY

10.1. We will continue to review the effectiveness of this policy to ensure it is achieving its stated objectives.