



CUSTOMER CHARTER

Our promises to you

We pride ourselves on offering our clients exceptional service and knowledgeable advice at a competitive price. When you become a client of Davies Tracey you have our assurance of the following customer service promises.

1) Fixed Fees

If required, we will provide a fixed fee quote in advance of any work we undertake on your behalf. Otherwise we will charge for work on an hourly basis. We are happy to disclose our hourly rates, which are extremely competitive in our local area.

2) Telephone Support

You can call us at any time without fear of extra charges. We want our clients to discuss their business ideas, financial or tax issues with us, without fear of mounting costs. If your call results in a need for us to carry out chargeable work on your behalf, we will make you aware of this in advance of carrying out that work.

3) Free Initial Tax Review

We welcome clients by identifying all the tax planning opportunities you are not presently taking advantage of – saving you money longer term.

4) Free Tax Tips

At least monthly, you'll receive tips relevant to business owners, delivered to you by E-mail and helping you pay less tax.

5) Hassle-free outsourcing

We understand doing the paperwork can be stressful for many business owners who really just want to get on with

running and building their business. So if you wish, we can take all the bookkeeping, payroll and other paperwork off you as well as the normal annual accounts and tax work, all at competitive rates.

6) Flexible & plain-speaking

There's no technical speak from us. We speak to you openly and honestly and promise not to blind you with jargon. We want you to feel comfortable to pick up the phone to us whenever you need, for whatever you want and know you'll get good sound understandable advice. We will work with you in the way that suits you – in person, on the phone or online.

WHAT WE ASK OF YOU

Communication - please keep us up to date of any changes or decisions to your business or personal circumstances so we can always give you the best advice. Please also give us feedback on how we are living up to our promises to you.

Honesty - We ask you to be honest and open with us when providing information, to avoid costly mistakes.

Referrals - The best way to thank us if you're happy with our services.