

## Deputy Services

Here at Slaters & Co Accountants we understand that being appointed as a Deputy for an individual is an appointment with great responsibility. As deputy you are usually be required to report financial activities to the Office of the Public Guardian (OPG) and/or Court of Protection (CoP).



Office of the  
Public Guardian

Whilst the OPG and Court of Protection are there to help and provide assistance to Deputies, they are also there to oversee that the deputies deal with the assets of the individual correctly and will be reportable for any financial discrepancies that may arise. As such, Annual accounts detailing all of the financial activities of the Deputies are required by the OPG who will often review these in depth and raise any questions or concerns.

Here at Slaters & Co Accountants we can assist Deputies appointed by the Court of Protection with their reporting requirements for the preparation and reporting of the annual accounts and also the preparation of the personal tax returns

We offer three core services:

### Annual Accounts

Preparation and  
submission of annual  
accounts

Fixed fee of  
**£235**  
(plus VAT)

### Standard Tax Return

Preparation and  
submission of self  
assessment tax return and  
HMRC liaison

Fixed fee\* of  
**£120**  
(plus VAT)

### Technical Tax Return

Preparation and  
submission of self  
assessment tax return and  
HMRC liaison

Fixed fee\* of  
**£235**  
(plus VAT)

\*The fixed fee is dependent on all tax certificates and other documentation being correct. Where documentation is incorrect



## Preparation of annual OPG accounts

Depending on the level of supervision you, as a deputy, are allocated the OPG typically require deputies to submit annual accounts.

The annual reporting procedure to the OPG is to ensure you are acting in the client's best interest, and is also a way for the OPG to check that the client's funds are not being misused.

**Slaters & Co Accountants will prepare and complete the OPG012 annual reporting on your behalf, for a fixed fee of £235 plus VAT**

In order to complete these accounts you should keep all bank statements, receipts, invoices, records and correspondence for your dealings on behalf of the client.

*What happens if you do not submit the report?*

It is important to send the completed report on time. If you don't the Public Guardian may decide to investigate the decisions that you have made. This may include:

- Asking for more information or asking a Court of Protection Visitor to visit you and/or the client;
- In some cases changing the level of supervision, which will mean closer supervision of your decisions; or
- Asking the Court to remove you as Deputy and appoint a new one.

Therefore the importance of preparing your annual accounts correctly and on time is vital, and this is where Slaters & Co Accountants can help.

For more information or to discuss any requirement you have contact us today on 01782 566101 or [Steve.Mastin@SlatersCA.co.uk](mailto:Steve.Mastin@SlatersCA.co.uk)



## Preparation of personal tax returns

Tax can be a tricky area. Due to the complexities of understanding what is taxable and what isn't we always recommend that you work alongside a tax specialist.

For instance, a periodical payment is not taxable but interest from the Court Funds office is, or Employment & Support Allowance income based is not taxable, but Employment & Support Allowance contribution based is.

Here at Slaters & Co Accountants we offer 2 tax returns for Deputies;

### Standard Tax Return

Includes the preparation and submission of the self assessment tax return, and dealing with HMRC on your behalf as Deputy.

To include;

- Bank Account Interest
- Building Society Interest
- Court Funds Office Interest
- Taxable Benefits Received
- Minimal Investment Interest & Dividends
- 1 x Property Rental (UK Furnished/UK Unfurnished only)

**Fixed fee of £120 plus VAT**

*(All tax certificates and property rental accounts must be in order, otherwise there may be an increase in cost).*

### Technical Tax Return

Includes the preparation and submission of the self assessment tax return, and dealing with HMRC on your behalf as Deputy.

To include;

- (The same as Tax Return 1 and also)
- Medium to large Investment Interest & Dividends
- 2 or more Property Rentals (UK Furnished/UK Unfurnished/Furnished holiday let/Property abroad)
- Capital Gains Tax reporting on Investments/Property

**Fixed fee of £235 plus VAT**

*(All tax certificates and property rental accounts must be in order, otherwise there may be an increase in cost).*

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