



Overview for Prospective New Members



January 2023

Service Overview



Q.

What is Tax Natives?

A.

Tax Natives is an international tax network that connects either:

- I. Member tax advisers (“Tax Natives”) in one jurisdiction with Tax Natives in other jurisdictions for collaboration on client projects; or
- II. Individuals, businesses or professional advisers (“Tax Explorers”) with seeking Tax Natives in particular jurisdictions

What is an Explorer?

An Explorer is simply a taxpayer client looking for international tax advice or a professional acting on behalf of a taxpayer client.

What is a Native?

A Native is a qualified and regulated (where applicable) tax adviser operating in a specific jurisdiction.

Tax Native Criteria

Our Natives must satisfy certain criteria. Not because we enjoy red tape, but because we need to ensure referrals are made to advisers possessing expertise, experience, reliability reliable and will be around for some time to come.

Our criteria is as follows:

- Named adviser must be appropriately qualified (e.g. Solicitor, Barrister, Accountant, Chartered Tax Adviser or other relevant qualification)
- Have professional indemnity insurance (copy must be provided)
- Have 3 full time staff (which include the proprietor/principals)
- Must operate through a legal entity such as limited company or LLP

Please contact us if you have any queries.

Who is the service for? (B2B)

Professional tax advisers (Natives)

Example process

A UK accountant (**Explorer**) is assisting a client buying a property in Majorca.

They need tax advice for their client and submit requests to contact an adviser in Spain.

The query is referred to a Spanish adviser (Native). After discussing the issue with the Explorer, the Explorer (or his or her client if preferred) engage with the Native.

In this scenario, the adviser charges £1,500 for their services. Of this £1,500, 12.5% (£187.50) is split 60/40 between the referring accountant and Tax Natives.

Where the referring accountant engages on a white label basis with the Spanish adviser, they are free to build whatever margin into the engagement fee they feel appropriate.

Who is the service for? (B2C)

Individuals / trading businesses (Explorers)

Example process

An individual **Explorer** is purchasing a property in Spain.

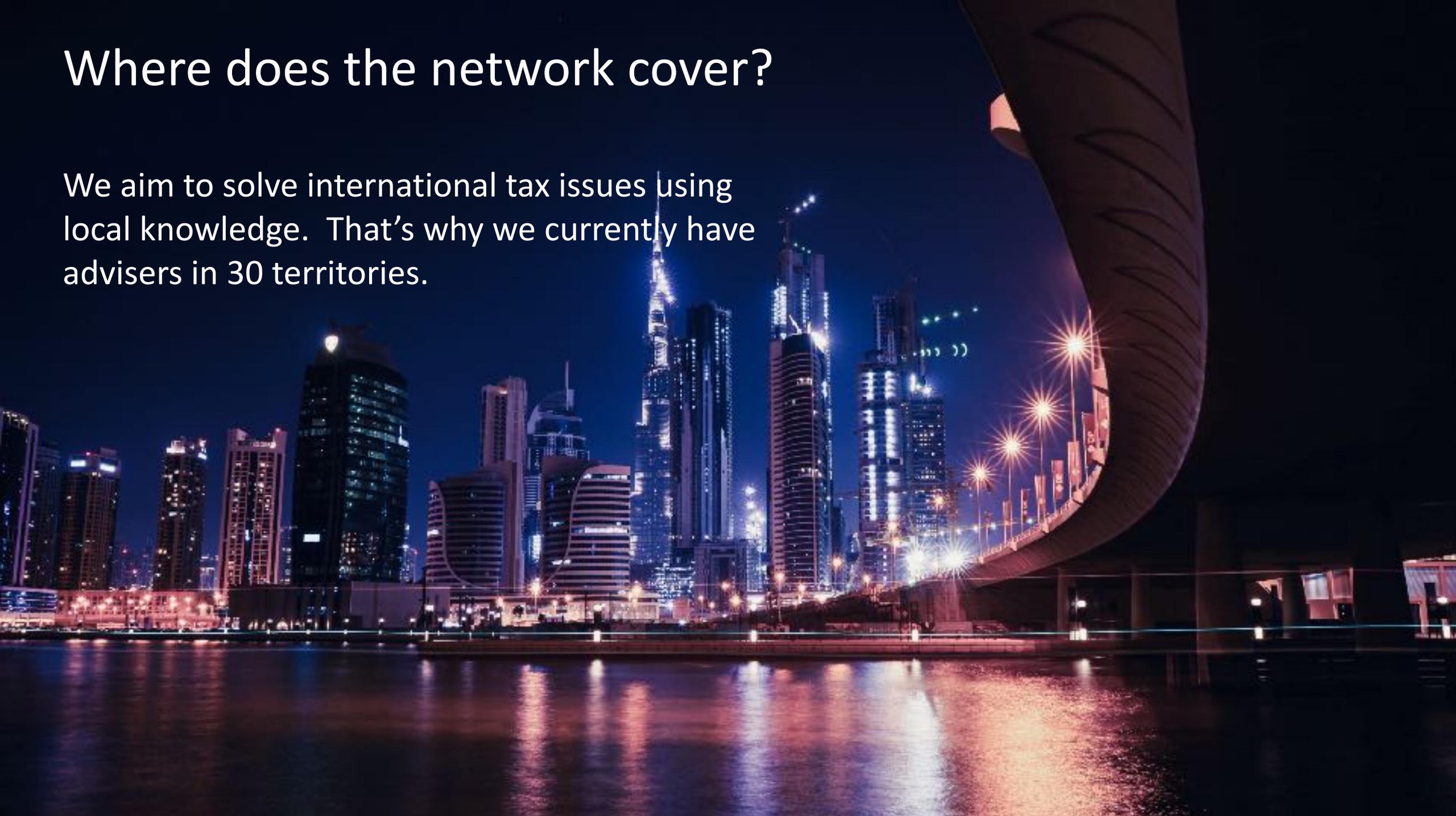
They search for Spanish tax advice and arrive at Tax Natives where they connect with a Spanish adviser (**Native**).

The Spanish adviser (**Native**) sends a quote to the client. If this is accepted by the client, then they will engage with the Native.

A 12.5% fee is payable by the adviser to Tax Natives upon completion of the advisory work.

Where does the network cover?

We aim to solve international tax issues using local knowledge. That's why we currently have advisers in 30 territories.



We cover 30 jurisdictions worldwide, including:

Australia. Barbados. Canada. China. Cyprus.

France. Germany. Guernsey. Gibraltar. Greece.

Hong Kong. India. Ireland. Isle of Man. Israel.

Italy. Japan. Jersey. Kenya. Korea. Malta.

Mauritius. Mexico. Netherlands. New Zealand.

Nigeria. Portugal. Russia. Singapore. South Africa.

Spain. Switzerland. UAE. UK. USA.

Membership fees

Curator Native FREE / MONTH

The Curator is a fully-fledged member of the Tax Natives team. As such, they are capable of making introductions to other Tax Natives and are also able to take leads from their fellow Natives.

However, the Curator has additional responsibilities. They are tasked with the responsibility of managing and updating one of the jurisdiction pages.

There is only one Curator membership available for each jurisdiction.

Where a Curator fulfils their commitments then they receive a 100% discount against their monthly membership fee.

A Curator can also provide articles if they wish.

Creator Native FREE / MONTH

The Creator is a fully-fledged member of the Tax Natives team. As such, they are capable of making introductions to other Tax Natives and are also able to take leads from their fellow Natives.

However, the Creator has additional responsibilities. They commit to their other Natives that they will produce at least one piece of quality content each quarter – whether an article, video or other valuable content.

There are multiple Creator memberships available for each jurisdiction. Where a Curator fulfils their commitments then they receive a 100% discount against their monthly membership fee.

Adviser Native £65 / MONTH

The Adviser is a fully-fledged member of the Tax Natives team. As such, they are capable of making introductions to other Tax Natives and are also able to take leads from their fellow Natives.

The Adviser Native is a care-free soul and has made no other commitments to his fellow Tax Natives to generate content or curate a jurisdictional page. That's cool.

However, the Adviser will be eligible to pay the full monthly membership fee.

Initial admin fee	Free	Free	Free
Minimum contract fee	12 Months	12 Months	12 Months
Content Creation	No	Yes	No
Managing and updating your jurisdiction page	Yes	No	No



If you have any further questions,
we'd love to hear from you.

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