

# Markel Tax

Empowering accountants  
in a time of change

In an era of unprecedented transformation for UK accountancy, Markel Tax provides the insurance solutions and expert consultancy you need to adapt and thrive.



**MARKEL**



# Working with Markel Tax

→ Your clients trust you to offer credible, impartial and reliable advice. We help you build on your reputation with services that both you and they can depend on.

→ Markel Tax is an A-rated insurer supporting UK accountancy practices to adapt to changing circumstances. A trusted partner to over 1,500 accountants, we provide insurance solutions and expert consultancy in niche areas.

→ Our teams have helped accountants respond to many of the biggest shifts that have affected the UK accountancy sector in recent decades, from providing award-winning insurance to being the first firm to win an IR35 case at tribunal in 2002.

## At a glance



A leading fee protection and tax consultancy specialist



A-rated insurer, providing fee protection to UK accountants since 1997



Part of Markel Group, a global Fortune 500 company



Trusted partner to over 1,500 accountants



# Fee Protection Insurance

Our fee protection insurance helps mitigate the financial burden of HMRC enquiries for both you and your clients. Defence costs can quickly escalate during an HMRC enquiry or dispute, potentially leaving your clients with substantial fees to pay.

Fee protection insurance mitigates the risk for both of you by transferring the risk of professional fees to us. At the same time, it's an extra revenue stream for your practice, with a suite of value-added services included that make it an innovative proposition to your clients.

## At a glance



Generous levels  
of cover of up to  
£125,000



Trusted partner to over  
1,500  
accountants



A-rated insurer,  
providing fee protection  
insurance to UK  
accountants since 1997



Rated as 'World Class'  
in our Net Promoter  
Score in 2025

## Scheme options

Whether you want to cover your entire client base or offer fee protection as an optional extra service, our flexible approach means we'll help you find the scheme that works best for you.

## Claims

Our expert claims team is on hand to deal with claims fairly and swiftly, ensuring any disruption to your client and practice are kept to a minimum while you manage the enquiry.

## More than just insurance

Take out fee protection insurance with Markel and you'll also benefit from a suite of services that drive down your risk and add value to you and your clients. That includes access to **highly experienced ex-HMRC consultants** for advice and support, ensuring you get the best result for clients under enquiry, and 24/7 access to a team of solicitors that can support you with employment and commercial matters.



Turn to **pages 4-6** to find out more about the marketing, admin and business support that comes as standard with every fee protection insurance policy.

# Marketing support with your policy

Maximise your fee protection scheme by leveraging our industry-leading marketing support, designed to increase conversion, growth and cross-selling opportunities for your clients.

Upselling your fee protection insurance scheme couldn't be easier with the marketing support you'll receive as part of your policy. Transforming the way you communicate with your clients, our EngineRoom+ platform gives you the ability to build white-labelled campaigns in minutes, with tried-and-tested messaging to boost your revenue. You can also go a step further with our Managed Service Plan, which deals with all the marketing and admin of your fee protection insurance scheme to save you valuable time – and all while unlocking new revenue streams.

## At a glance

### EngineRoom+

Build, track and optimise 100% GDPR-compliant marketing campaigns in minutes with EngineRoom+. Our digital-first marketing platform makes it easy to educate your clients about fee protection insurance, giving you access to tried-and-tested marketing messages that you can personalise with your firm's branding.

### Managed Service Plan

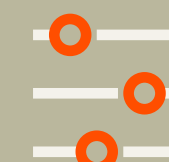
This time-saving, all-in-one service manages and monitors the marketing and admin side of your fee protection insurance scheme so you don't have to. We'll promote and administer your scheme to help you unlock new revenue streams through preferential introducer fees for our specialist consultancy services.



Engage with  
your clients  
throughout the  
year



Build and  
schedule  
marketing  
campaigns in less  
than 10 minutes



Real-time  
analytics to boost  
performance



100%  
GDPR  
compliant

# Policy administrative support

With all your online tax services in one place, and a secure portal for easy payments, managing your fee protection scheme is simple with Markel.

**MarkelHub** is where you'll find all your online tax services, meaning you'll have everything you need from us in one place. From managing your scheme and setting rates to making a claim and paying invoices, this online portal is your single point of call for managing your scheme and accessing your benefits, 24 hours a day.

It's here that you'll be able to add and renew clients, book calls with our tax, VAT and legal advisors and get quick and easy PI quotes. This is also where you can access all our advice and support.

## At a glance



Secure payment  
handling for total  
convenience



All your online  
tax services in  
one place



You'll also have the option to use our digital service portal, which securely handles payments for your customers' convenience and peace of mind, and is fully branded with your practice name. You can add this to your website or share it with customers as a link, allowing them to conveniently make payments online and reducing administration for your practice.



Easy administration  
and claims



Book tax, VAT and  
legal advice whenever  
you need it

# Expert advice and technical support included with your policy

When you don't have access to in-house expertise in a specific area, you can turn to our team for advice and support on all areas of tax, law and business management, all included with an fee protection insurance policy.

Whether you need a second opinion on a stamp duty issue or you're after a template Health & Safety policy, you'll find what you need to support your businesses growth.

## At a glance

### Tax and VAT helpline

Our experienced team is at the end of the phone whenever you need assistance or a second opinion with any UK direct tax, stamp duty, PAYE, NIC, status or VAT issue.

### Business and legal helpline

Our 24/7 legal helpline gives you access to over 40 experienced solicitors for help with a range of everyday legal issues, such as employment law and health and safety.

### Business Hub

This provides practical, up-to-date business advice, ready-to-use templates, contracts and training resources.



Round-the-clock advice and support to help you run your business



Dedicated tax and VAT advice from experts



24/7 business and legal helpline



DIY business templates and resources

# Contractor solutions

Our contractor solutions offer tailored consultancy and insurance across several key areas, mitigating your clients' risk and generating referral income for you.

In an industry with ever-changing legislation and compliance hurdles, where simple mistakes or misunderstandings can lead to HMRC investigations and penalties, offering your clients access to leading experts adds another string to your bow.

We combine reliable, up-to-date advice and consultancy on contractor rules and regulations with specialist insurance protection to cover the costs of tax liabilities and HMRC enquiries. We can advise your clients on their current position, ensure they're operating compliantly, and help defend them should they come under investigation.

## At a glance



First to win IR35 at Tribunal in 2002



Successfully defended more contractors at Tribunal on IR35 and Status than any other UK consultancy



Flexible delivery via white label or referral



Custom coverage and indemnity levels



# Contractor solutions – services

## Construction Industry Scheme (CIS)

We help contractors navigate compliance with CIS, providing advice and support on registering for gross payment status, expenses compliance and successful defence against HMRC challenges.

## Self-employed status

We can review your clients' labour supply, contracts and policies to ensure they're compliant, whether engaging a self-employed individual for a one-off project or for ongoing requirements.

## IR35

As one of the industry's leading IR35 experts, we can help all your clients – whether they're contractors or end customers – to understand their status and their risk of non-compliance.

## Umbrella company

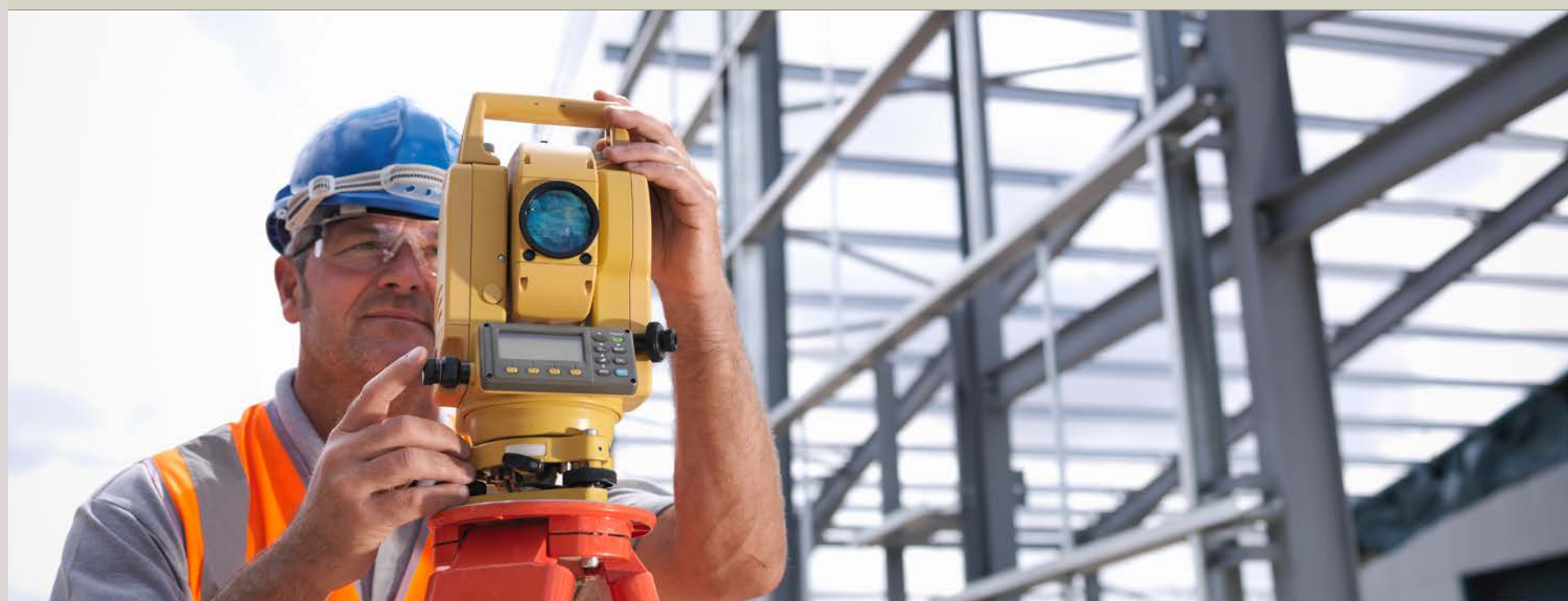
Our consultancy services can help your existing umbrella company clients navigate their obligations, as well as ensuring new ones are set up compliantly from the start.

## Managed Service Company (MSC)

We provide tax and legal advice, reviews and assistance to support contractors and accountants around this complex legislation, reducing the risk of substantial financial liabilities.

## Tax Losses Insurance

We provide IR35 and Self-employed status tax losses insurance for compliant businesses providing specialist enquiry and tax losses cover up to limit of indemnity.



# Tax investigations consultancy

Our tax investigations consultancy service gives you and your clients direct access to one of the UK's most experienced tax defence teams.

With HMRC investing heavily in compliance activity, it's predicted that enquiries will get longer and more complex. Our expert team of ex-HMRC officers can provide specialist support at every stage of a tax investigation, working to reach the best possible outcome for you and your clients.

We're experienced in handling everything from routine investigations to serious fraud enquiries, achieving numerous successes in resolving tax disputes through the Alternative Dispute Resolution (ADR) process. We can also provide specialist support in a variety of areas including Code of Practice 8 and 9, the Worldwide Disclosure Facility, the Let Property Campaign Disclosure, any voluntary disclosures required to HMRC and VAT opinions and disputes.

We work with you, not in competition, offering a flexible approach to suit you and support your client relationships – whether you want to work ad hoc, on a white label basis or receive an introducer fee.

## At a glance



Experienced team of ex-HMRC tax investigation experts who understand its inner workings



Hands-on expert support at every stage of an enquiry



Specialist support for HMRC compliance activity for individuals, partnerships and companies



Complimentary initial discussion and case assessment

# Get in touch

With Markel Tax at your side, your accountancy practice will have all the tools it needs to thrive. We're committed to empowering you with the expertise you need to adapt and grow. By partnering with us, you can generate valuable revenue streams while safeguarding your clients' and your practice's best interests.

Speak to one of our Senior Relationship Managers to find out more.

Visit our website and learn more about how our Tax team can help your firm.  
[uk.markel.com/tax](https://uk.markel.com/tax)



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# MARKEL

[uk.markel.com/tax](https://uk.markel.com/tax)

All information accurate at the time of production November 2025.  
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Calls from a landline will be charged at your local rate. Calls from mobile phones are charged at your local rates in accordance with your tariff.

