

FOI 0309/2024 Request

Under the Freedom of Information Act, I would like to request the following information about Birmingham and Solihull Mental Health NHS Foundation Trust:

For the financial year 2021/2022:

Q#	Question	Your answer
1	Did you use an external VAT/ tax advisor? (If no, please disregard all other questions for this financial year)	Yes -VAT only
2	What was the FY spend on VAT/ tax advice (£)	£ 63,261.00
3	What was the name of the primary VAT/ tax advice supplier?	Liaison Financial Services LTD
4	Was this advice procured on a contract or an ad hoc basis?	ADHOC Contract
	<i>If the answer to Q. 4 is 'ad hoc' please go directly to Q. 6. If the answer to Q. 4 is 'contract', then:</i>	
5a	What was the contract start date?	24/05/2024
5b	What was/ is the contract end date?	24/05/2025
5c	Which framework agreement was used for contract procurement?	RM6226
6	What support/advice was included in the contract (e.g. VAT, Corporation tax, National Insurance)?	VAT Only

For the financial year 2022/ 2023:

Q#	Question	Your answer
1	Did you use an external VAT/ tax advisor? (If no, please disregard all other questions for this financial year)	Yes -VAT only
2	What was the FY spend on VAT/ tax advice (£)	£ 36,457.79
3	What was the name of the primary VAT/ tax advice supplier?	Liaison Financial Services LTD

4	Was this advice procured on a contract or an ad hoc basis?	ADHOC Contract
	<i>If the answer to Q. 4 is 'ad hoc' please go directly to Q. 6. If the answer to Q. 4 is 'contract', then:</i>	
5a	What was the contract start date?	24/05/2024
5b	What was/ is the contract end date?	24/05/2025
5c	Which framework agreement was used for contract procurement?	RM6226
6	What support/advice was included in the contract (e.g. VAT, Corporation tax, National Insurance)?	VAT Only

For the financial year 2023/ 2024:

Q#	Question	Your answer
1	Did you use an external VAT/ tax advisor? (If no, please disregard all other questions for this financial year)	Yes -VAT only
2	What was the FY spend on VAT/ tax advice (£)	£106,832.50
3	What was the name of the primary VAT/ tax advice supplier?	Liaison Financial Services LTD
4	Was this advice procured on a contract or an ad hoc basis?	ADHOC Contract
	<i>If the answer to Q. 4 is 'ad hoc' please go directly to Q. 6. If the answer to Q. 4 is 'contract', then:</i>	
5a	What was the contract start date?	24/05/2024
5b	What was/ is the contract end date?	24/05/2025
5c	Which framework agreement was used for contract procurement?	RM6226
6	What support/advice was included in the contract (e.g. VAT, Corporation tax, National Insurance)?	VAT Only

Year to date for financial year 2024/2025:

Q#	Question	Your answer
1	Are you using an external VAT/ tax advisor? (If no, please disregard all other questions for this financial year)	Yes -VAT only
2	What is your forecast FY spend on VAT/ tax advice (£)	£63,351.94
3	What is the name of the primary VAT/ tax advice supplier?	Liaison Financial Services LTD
4	Are these advice service(s) procured on a contract or ad hoc basis?	ADHOC Contract
	<i>If the answer to Q. 4 is 'ad hoc' please go directly to Q. 6. If the answer to Q. 4 is 'contract', then:</i>	
5a	What was the contract start date?	24/05/2024
5b	What was/ is the contract end date?	24/05/2025
5c	Is there an option to extend the contract?	RM6226
5d	If already expired, do you plan to procure a new contract?	VAT Only
5e	Which framework agreement was used for contract procurement?	Yes -VAT only
6	What support/advice is included in the contract?	£ 63,261.00