



## Our Firm

PHDKalev is a small company orientated to the needs for foreign to Bulgaria customers who want to set up a company and also manage it from distance so we create a successful approach to business.

The specialist skills, combined with our understanding of small to large businesses, enable us to provide reliable, efficient and quality solutions to our clients' taxation needs.

## Our Approach

We believe the key to giving the right type of complex taxation advice is for us to understand your business. At PHDKalev, we understand the issues relevant to small to medium businesses and have the specialist complex taxation skills to ensure the right result.

To understand a business we need to identify the drivers of that particular business.

Depending on the requirements of the advice and the level of complexity, we will;

Meet with you to get a detailed brief on the issues and get a full understanding of all the facts;

Request further information relevant to the matter;

Clarify any questions we may have based on the facts and information provided;

Provide you with our advice;

Discuss with you the outcomes of that advice and options available to you to minimise your tax position along with any other matters that may have come to our attention.

We will only provide you with advice when we have all the facts;

We will advise you if we believe there are better outcomes outside the scope of your question;

We will consider related commercial and taxation matters that you should consider;

We will understand the commercial imperatives that drive your business. Taxation is important but rarely a driver.

At PHDKalev we consider communication to be an essential ingredient for the completion of a reliable engagement. All parties involved in the matter are kept informed throughout the process to ensure any queries are resolved quickly and key issues are identified early on in the process. Each client/referrer is assigned a lead partner to manage the relationship and ensure communication flows freely.

Often when a complex taxation matter is required it needs to be completed in a timely manner.

We are more than happy to commit to a fixed timeframe for the completion of engagements.

## Our Experience

We have provided advice in complex taxation matters which include;

Business Structuring

Complex Restructures

Business Investment

Management Buy-out's

Long Term Incentive Plans & Employee Share Schemes

Business Sale/Purchase

Capital Gains Tax

Due Diligence for Initial Public Offerings (IPO)

Succession Planning

Estate Planning

Tax Consolidations, Demergers & Scrip for Scrip

International taxation issues

Share Buy Backs

Compliance Reviews

Tax Audits, Objections & Private Rulings GST

The basic steps of our complex taxation engagement process are as follows:

Step 1: Receive briefing

Step 2: Understand the business

Step 3: Understand the concerns of the stakeholders

Step 4: Understand the taxation issues

Step 5: Determine the solutions alternatives

Step 6: Resolve queries and confirm assumptions

Step 7: Report

We have devoted considerable time to develop tools, systems, training and procedures to ensure each taxation assignment undertaken by our office is completed efficiently and effectively.

We provide personal involvement at partner level - at every step in the process.

We do not accept the first or easy answer, and always seek to find the best solution for your business and the stakeholders.

## Contact Us

If you have a matter that we can assist with, please do not hesitate to contact Kalin Kalev:

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