



YEAR BOOK
OF
The Worshipful Company of Tax Advisers

*A modern City Livery Company for tax professionals,
promoting fellowship and the profession,
supporting charitable and educational causes.*

Incorporated by Royal Charter

FOR THE COMPANY YEAR 2025 - 2026

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Foreword



Welcome to the Company's 2025/26 Year Book, a valuable resource for keeping our membership connected and for helping us all to be good company for each other and for the City.

Among other useful information, The Year Book contains a full listing of our members and a diary of our events throughout the year. Feel free to use these when planning your participation in the Company's activities. If you would like to attend an event but are not sure whether anyone else you know will also be attending, you can use the Year Book to invite other members or to contact me or one of the Wardens – we will always look out for you or connect you with someone we know will be there.

Please bear in mind, though, that while the diary of events in the Year Book is as accurate as it can be at the date of publication, it is inevitably subject to change as the year proceeds. So, for the most up-to-date information, please refer to the website: www.taxadvisers.org.uk

Thank you to everyone involved in the considerable task of updating and proof-reading the Year Book. Notwithstanding all their efforts, some errors may have slipped through the net. If you spot one, please contact our Administrative Officer at office@taxadvisers.org.uk

I look forward to enjoying the year ahead with you all.

Matthew Peppitt

Master

September 2025

DIARY FOR THE COMPANY YEAR 2025 - 2026

Please refer to the Company [website](#) for the most up to date list.

2025	Event & Location	Type
Tuesday 23 September	Installation Court meeting at Ironmongers' Hall, Church Service St Bartholemew the Great, Dinner at Ironmongers' Hall	WCTA
Sunday 28 September	The Woolmen's Livery Sheep Drive and Livery Fair	Inter-Livery
Monday 29 September	Common Hall Election of Lord Mayor, Lunch at Founders' Hall	City
Sunday 12 October	The Clink, Three course lunch at Brixton Prison	WCTA
Tuesday 14 October	History of Tax Lecture, Information Technologists' Hall & Online	WCTA
Monday 20 October	Tax Professionals Seminar	WCTA Online
Monday 3 November	Tax Professionals Seminar	WCTA Online
Wednesday 5 November	Autumn Committees Day, Information Technologists' Hall and Committees' Supper	WCTA
Friday 7 November	Admission of Lord Mayor (Silent Ceremony), Guildhall	City
Saturday 8 November	Lady Mayor's Show	City
Wednesday 19 November	St Cecilia Festival, Westminster Abbey, Lunch at One Great George Street	City
Thursday 27 November	Battersea Dogs Home Tour	WCTA
Tuesday 16 December	Court Meeting at Information Technologists' Hall, Carol Service at St Bartholomew the Great, and Supper at Butchers' Hall	WCTA
2026		
TBC February	Inter Livery Quiz	WCTA
Tuesday 3 February	History of Tax Lecture, Information Technologists' Hall	WCTA
Wednesday 11 February	Winter Committees Day, Information Technologists' Hall	WCTA
Tuesday 17 February	Pancake Races, Guildhall Yard, Lunch Guildhall Undercroft	Inter-Livery
Monday 2 March	Inter-Livery Bridge, Drapers' Hall	Inter-Livery
Tuesday 17 March	Court Meeting and Budget Banquet, Stationers' Hall	WCTA
Friday 20 March	United Guilds Service, St Paul's Cathedral, Lunch at Plaisterers' Hall (TBC)	Inter-Livery

DIARY FOR THE COMPANY YEAR 2025 – 2026 (CONTINUED)

Please refer to the Company [website](#) for the most up to date list.

2026	Event & Location	Type
Thursday 16 April	Big Curry Lunch, Guildhall	Inter-Livery
Wednesday 22 April	Spring Committees Day, Information Technologists' Hall	WCTA
Friday 24 April	Treloar's Gala Dinner, Mansion House	City
Wednesday 13 & Thursday 14 May	Inter Livery Clay Shooting, West London Shooting School	Inter-Livery
Saturday 17 May	Inter-Livery Regatta, Cowes	Inter-Livery
Thursday 11 June	Election Court Meeting, Civic and Charities Lunch at Bakers' Hall	WCTA
Wednesday 24 June	Common Hall: Election of Sheriffs, Lunch at Founders' Hall (TBC)	City
Saturday 27 June	Inter Livery Croquet, Sussex County Croquet Club	Inter-Livery
Wednesday 1 July	Summer Committees Day, Information Technologists' Hall	WCTA
Wednesday 1 July	Court Dinner, Temple Bar	
Saturday 04 July	Coopers' Cask Race, Guildhall Yard	Inter-Livery
Thursday 30 July	Joint lunch, WCTA and Worshipful Company of Makers of Playing Cards, Dyers' Hall	Inter-Livery
Monday 21 September	Installation Court Meeting at Mercers' Hall, Church Service at St Michael Cornhill, Dinner at Mercers' Hall	WCTA



The Court

Seated from L to R: Middle Warden Howard Ashmore, Upper Warden Caroline Turnbull-Hall, Master Matthew Peppitt, Renter Warden Michael Ashdown, Deputy Master Richard Geldard

From L to R: Adrian Stevens, Winnie Cao, Stephen Hodgson, Lorraine Parkin, Kevin Thomas, Michael Godbee, Marcus Fincham, Anthony Thomas, Mike Gibbons, Morag Loader, James Dixon, Robert Lowth (Clerk),

The following Court members are not shown: Sue Christensen, Jeremy Coker, Andrew Gillett, Nicolas Kokkinos, Alan McLintock, Kevin Offer, Paul Morton

THE COURT

After the Installation Court on 23 September 2025

MASTER

Matthew Peppitt

UPPER WARDEN

Caroline Turnbull-Hall

MIDDLE WARDEN

Howard Ashmore

RENTER WARDEN

Michael Ashdown

DEPUTY MASTER

* Richard Geldard

COURT ASSISTANTS (* indicates a Past Master)

* Anthony Thomas	Nicolas Kokkinos
* Kevin P Thomas	Lorraine Parkin
* Morag Loader	Stephen Hodgson
* Marcus Fincham	Alan McLintock
* Paul Morton	Kevin Offer
* Sue Christensen	Winnie Cao
* Mike Gibbons MBE	Jeremy Coker (Treasurer)
	Adrian Stevens

HONORARY ASSISTANTS

Andrew Gillett

James Dixon

HONORARY SECRETARY

* Clive Tulloch

HONORARY CHAPLAIN

The Reverend Marcus Walker

HONORARY ALMONER

George Duncan

CLERK

Robert Lowth CBE

BEADLE

Michael Myers

COMMITTEES

The Master's Committee

The Master (Chair)
Deputy Master (Chair)
The Upper Warden
Past Masters on the Court

Management Committee

The Master (Chair)
The Upper Warden
The Middle Warden (Secretary)
The Renter Warden
The Deputy Master
The Treasurer
Committee Chairs (Social, Charities,
Communications, Membership)
In attendance: Clerk

The Assistants' Committee

* Paul Morton (Chair)
Court Assistants (except Past Masters, Master
and Wardens)

Charities Committee

Lorraine Parkin (Chair)
* Clive Tulloch (Secretary)
Bill Dodwell (Treasurer)
David Scott (Communications
Representative)
George Duncan (Honorary Almoner)
John Whitehead (Grants Officer)
* Mike Gibbons MBE
John Cullinane
Dee Shah
Richard Wernick
Gordon Slater
Master, Deputy Master, Wardens,
Treasurer ex officio
In attendance: Clerk

Finance Committee

Jeremy Coker (Chair)
* Marcus Fincham
* Kevin Thomas
Master, Deputy Master & Wardens ex
officio
In attendance: Clerk

Membership Committee

Michael Ashdown (Chair, Communications
Representative))
Patrick Ronan (Secretary)
* Anthony Thomas
Peter Ferrigno
Stephen Hodgson
Nicolas Kokkinos
Kyriakos Kostarelos
David Massey
Manda Pillay-Maloney
Colin Smith
Susan Ball
Master, Deputy Master, Wardens &
Treasurer ex officio
In attendance: Clerk

Social Committee

Alan McLintock (Chair)
Peter Allen
James Dixon
Alison Lovejoy
Kevin Offer
Gwen Ryder
David Scott
Carrie de Silva
Adrian Stevens (Communications
Representative)
Master, Deputy Master, Wardens &
Treasurer ex officio
In attendance: Clerk, Administration &
Events Officer, Bundler

Communications Committee

Nicolas Kokkinos (Chair)
Winnie Cao (Secretary)
Michael Ashdown
Stephen Hodgson
Hazel Johnson
Derren Joseph
Master, Deputy Master, Wardens &
Treasurer ex officio
In attendance: Clerk, a representative from
each other committee as nominated
Observer: * Kevin Thomas

ADMINISTRATIVE OFFICER

Carolyn Finch

ADMINISTRATOR

Chartered Institute of Taxation

GROUPS

Lord / Lady Mayor's Briefing Group

Stephen Hodgson (Chairman)

Dr Philip Baker OBE KC

Winnie Cao

Fernando Del Canto

Graham Jackson

Derren Joseph

Agata Kozolup

Jeremy Mindell

Tim Sarson [a non-company member who is an adviser to the Group]

History of Tax Group

* Morag Loader (Chairman)

James Carr

Andrew Constable

David Williams

Regulations and Ceremonial Group

Caroline Turnbull-Hall (Chair)

* Michael Godbee

* Morag Loader

Katherine Eldred

Education Sub-Group

Lorraine Parkin (Chair)

Scott Wallace-Cotter (Secretary)

Glyn Fullelove

James Kean

Agata Kozolup

Tamara Mykhaylenko

Dee Shah

Alan McLintock

Thomas Wallace

Livery Climate Action Group & Pollinating London – Liaison

* Marcus Fincham

Pan-Livery Pro Bono Interest Group – Liaison

Lorraine Parkin

Dee Shah

SPECIAL RESPONSIBILITIES

HMS Bangor
101 Squadron RAF
Adjutant General's Corps -
Staff and Personnel Support Branch
City of London + NE Sector ACF
St John Ambulance Cadets
Website Coordinator
Financial Services Group Liaison
Year Book
Editor of The Owl
Archivist

Caroline Turnbull-Hall
Adrian Stevens

* Marcus Fincham
* Marcus Fincham
Howard Ashmore
Nicolas Kokkinos
Michael Ashdown
* Kevin Thomas
Winnie Cao
(vacant)

BANKERS

HSBC

AUDITORS

Gravita Audit Oxford LLP

DATA PROTECTION

GENERAL DATA PROTECTION REGULATIONS

The General Data Protection Regulations (GDPR) protects individuals against the misuse of personal data and may cover both manual and electronic records. The Worshipful Company of Tax Advisers, The Tax Advisers' Charitable Trust and The Tax Advisers' Benevolent Fund (collectively known as WCTA) take their responsibilities under these regulations seriously and ensure they comply with the requirements.

All WCTA records whether they be held electronically or physically, fall within the scope of the Regulations. The Regulations require that any personal data held should:

- be fairly and lawfully processed
- be processed for limited purposes and not in any manner incompatible with those purposes
- be adequate, relevant and not excessive
- be accurate
- not be kept for longer than is necessary
- be processed in accordance with individuals' rights
- be secure; and
- not be transferred to countries without adequate protection

Our Privacy Notice is located on our website at:

<http://www.taxadvisers.org.uk/privacy-policy>

Consent

This Year Book sets out, for each member of the Company: name, roll number and date of admission to the Livery, or if a Freeman, date of admission to the Freedom.

Only where a member has given express consent, are contact details disclosed in this Year Book.

Data Protection Officer

WCTA Data Protection Officer (DPO) is Past Master Kevin Thomas. The WCTA DPO fulfils a number of roles, one of which is to be the primary and independent point of contact for data protection matters. The formal mechanism for members to raise concerns regarding the processing of personal data is primarily to email: clerk@taxadvisers.org.uk or send a letter by registered mail to: The Clerk, The Mill House, New Mill, Pewsey, Wiltshire SN9 5LD at which point the inquiry will be forwarded to the DPO for action. Verbal enquiries will be treated appropriately but must, if requested by the DPO, be followed up by email or in writing

THE LIVERY

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AFFILIATES

**The Commanding Officer,
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and Personnel Support Branch -
Lt Col Barry Cooke**

**The Commanding Officer
RAF 101 Squadron
Wg Cdr Graham Prager**

**The Commanding Officer
HMS Bangor**

IN MEMORIAM

The following member died in the period October 2024 to September 2025:

Liveryman

Richard Citron

APPRENTICES

At present there are no apprentices.

COMPANY ESTABLISHMENT AS AT 23 SEPTEMBER 2025

Honorary Liverymen	8
Honorary Freemen	1
Liverymen	171
Freemen	71
Companions	22
Apprentices	-
Total	273

DEPUTY MASTER'S REPORT ON HIS YEAR AS MASTER 2024/25

I am writing this report shortly before stepping down as Master and can reflect on a most enjoyable year. This was greatly helped by the fact that LNER's service from West Yorkshire had none of the interruptions of the previous year!

We continued to develop our strategy. We made more progress in some areas than in others but that will ever be the case.

Growing our membership

Growing our membership helps to strengthen the Company, now and for the future. It also increases our influence in the tax profession and the City of London. Our membership is, of course, your membership. Every member can help the Company to grow, and every member that does so – sponsoring a new Freeman through to admission – is individually appreciated, in the form of a free guest place at one of our major events. Just ask one of the Membership Committee for details.

During the spring, we held an evening for prospective members at IT Hall. This was an informal gathering, largely advertised via LinkedIn. We attracted over thirty attendees and seven of them joined as new Freeman in June with others interested in following them. We held another similar event in early September and I expect that these will become regular events.

We held a celebration of our 30th anniversary at the Shard in May, greatly helped by sponsorship from QX Global. The room capacity was 70 and we managed to squeeze in 72 members and prospective members. This was our first experience of sponsorship and we look forward to working more with QX Global in the future.

On the other hand, we lost members during the year. As we are now 30 years old, it is inevitable that some of our original members will depart and some of our newer members may find that they do not have the time to devote to Company events. We have taken steps to find out why members leave in the hope that we can address some of the causes.

It has been encouraging to see the increase in the number of Liverymen. The first step to becoming a Liveryman is to obtain your Freedom of the City of London. We set up group admission ceremonies at Guildhall a couple of years ago and these are now well established. Many thanks to Carolyn Finch for organising these ceremonies and for looking after membership matters generally.

Delivering events and activities that members find attractive

Our Social committee works hard to provide a broad range of activities. We continue with virtual events which can be attractive for those who live far away from London. We also hold occasional weekend events which may be attractive for those who are working full time five days a week.

I wanted to "do something different" during my year. Thus, for example, we held one of our social lunches at Watermen's Hall rather than Ironmongers' Hall and participated in a dinner on SS Great Britain in Bristol with the Engineers and three other Livery companies.

I was particularly pleased to be able to broaden the range of Halls that we use for our major events. We visited Mercers' Hall for the first time for our Budget Banquet and Tallow Chandlers' Hall for the first time in over 20 years for our Civic and Charities lunch.

In September we launched our Young Tax Advisers group which we hope will enthuse our younger members.

Increasing the impact of our charitable and educational support

Two factors help to increase our impact – money and people. I am pleased to report that income donated by our members increased by over £8,000 (30%) this year. This is partly the impact of our new members and partly because of the positive response to a circular I sent last November asking existing members to increase their donations. Thanks to you all for your response.

Our Education sub committee goes from strength to strength. They continue to work with Mulberry UTC, take part in Careers Fairs for those interested in a career in tax and help to mentor students that we support in the tax examinations.

One of the highlights of any Master's year is the visit by the Lord Mayor, Sheriffs, and many Livery Masters to Treloar's School. It was wonderful to see the positive approach of all at the school, both students and staff. The approach is to focus on what the students can do, not what they can't. I was delighted that the Charities committee agree to help the refurbishment of one of their accommodation blocks by purchasing a height adjustable sink.

Promotion of tax within the City and beyond

We continue to support the Lord Mayor and City of London at events such as the Common Halls and the United Guilds Service. We also attended the Treloar's dinner and the Sheriffs' Ball. I managed to Escape the Tower (of London) thanks to generous donations from many members!

We work with the Chartered Institute of Taxation and Association of Taxation Technicians in areas such as Careers fairs.

The Lord Mayor's Tax Briefing Group is very well regarded in the City for the briefing it provides to the Lord Mayor. Alderman Simon Pryke confirmed this when he said a few words following his admission as a Companion in June.

We continue to work with our military affiliates. I attended two dinners of the Management Accounting Section (Army) in Andover and Winchester and awarded our prize. A large group of us visited RAF Brize Norton in June with the hope of a refuelling flight over the North Sea. Sadly, technical issues meant that the flight had to be cancelled but, instead, we visited their workshop where one of the Voyager planes was undergoing a 12-year service – basically everything that could be taken out and serviced was.

HMS Bangor remains in the Gulf so we have not been able to visit them. However we hope to have one of her Commanders as our guest at our Installation Dinner.

And in conclusion

Finally a few thanks. Firstly to the members of Court, Committees and Groups for the hard work that they have put in during the year and their ongoing support. Secondly to Robert and Carolyn for providing the essential back-office support which all Masters need. Finally, to all of our members for participating in our activities during the year.

It only remains to wish Master Elect, Matthew Peppitt, and his Wardens, Caroline Turnbull-Hall, Howard Ashmore and Michael Ashdown, every success during the next year.

Richard Geldard

September 2025

The Company

Brief History

On 19 December 1995 some leading members of the Chartered Institute of Taxation (founded in 1930) adopted Ordinances for "The Guild of Tax Advisers". Its three primary aims were to enhance the standing of the profession of tax advisers in the City of London; to support and fund benevolent and charitable causes; and to provide for fellowship between tax advisers. Its sponsor was Alderman Richard Agutter, FCA, Master (2008-09) who became Sheriff for 2000-01. Immense support was received from Andrew Gillett, CTA, FCA, Clerk Emeritus of the Founders' Company.

At the Guild's first Civic Luncheon in Founders' Hall on 19 May 1997 the then Lord Mayor, the late Alderman Sir Roger Cork, FCA, accepted honorary membership.

Within five years on 12 December 2000 the Court of Aldermen constituted the Guild a City Company without Livery and the members became Freemen. Four years later, on 18 January 2005, the Court of Aldermen approved the Grant of Livery as the 107th Company in order of precedence.

In 2008 one of the Company's founder members and Past Master, Alderman Ian Luder, was elected Lord Mayor of the City of London, a singular honour for one of the City's newest Companies.

On 8 July 2009, the Privy Council approved the grant of a Royal Charter, which was formally presented by HRH the Duke of Gloucester KG KCMG on 13 May 2010.

In November 2013 the Company had a further link with the highest Civic office with the installation of Alderman Fiona Woolf CBE as only the second female Lord Mayor of the City of London. Past Master Nicholas Woolf enjoying a hectic and rewarding year as Lord Mayor's Consort. The Company admitted Fiona as an Honorary Liveryman and were delighted when she became Dame Fiona Woolf DBE in the 2015 New Year Honours.

In November 2023 the company was proud to support Honorary Liveryman Alderman Professor Michael Mainelli who became London's 695th Lord Mayor.

Membership

The Freedom and Livery of the Company are open to all qualified tax advisers and the Clerk will be glad to provide further details.

The Court from time to time appoints individuals to the status of Companion. The Company has an Apprenticeship Scheme, under which Liverymen can provide support and guidance to tax trainees in professional firms, particularly in those firms unable to provide substantial support to students and trainees.

Company Activities

The Company is complementary to the various professional bodies concerned with the practice and administration of taxation, notably by bringing together all those involved in the tax profession.

The Company provides regular briefings to the Lord Mayor and his staff on tax matters. During his year in office, the Lord Mayor, who has the status of a Government Minister, travels extensively, meeting ministers and officials of overseas governments and overseas business people. Those visits are aimed at facilitating international trade and promoting the UK's financial services industry. The Company's contribution is to help him understand the related tax issues and to lobby for improvements.

The Company has affiliations with *HMS Bangor*, one of the Royal Navy's minehunters; No 101 Squadron Royal Air Force, currently based at RAF Brize Norton; the Army Adjutant General's Corps - Staff and Personnel Support Branch; and the City of London and North East Sector Army Cadet Force and City of Westminster St John Ambulance Cadet Unit.

Charities

Company Freeman and Liverymen support the Company's two related charities:

1. The Tax Advisers' Charitable Trust. This is a general charitable fund which supports a number of tax-related and City causes, including education and the preservation of tax history. It particularly supports TaxAid and Tax Help for Older People, the two charities which provide help to those who need tax advice but cannot afford it. The Company uses this fund to annually support the Lord Mayor's Appeal, Mansion House Scholarship Fund, Sheriffs' & Recorder's Fund and the cost of sponsoring a taxi for the Worshipful Company of Hackney Carriage Drivers' Disneyland Children's Magical Taxi Tour.
2. The Tax Advisers' Benevolent Fund. This is a benevolent fund for the relief of past and present members of the Chartered Institute of Taxation and of the Association of Taxation Technicians, and their dependants, who are suffering hardship. This fund is also used to give means-tested loans to students of the CIOT and ATT who need financial assistance to study for their examinations.

Being a new Company, there are no substantial endowments upon which to call and hence all Freeman and Liverymen are expected to contribute generously to one or both of the funds to enable the charities to fulfil their objectives.

Social Life

The Company has an active programme of events ranging from the formal City functions to a wide variety of informal activities. On the formal side, there are normally two dinners a year, one in March and the other September, and one formal luncheon usually in June in the presence of the Lord Mayor or other civic dignitary and when charitable donations are made. There are also opportunities to attend the annual United Guilds' Service at St Paul's Cathedral and for Liverymen [of one year's standing] to obtain seats to participate in the Election of Sheriffs and the Lord Mayor annually, each of which are followed by lunch in a nearby Livery hall. Informally, the Company runs a programme of visits, and social evenings and members often support inter-Livery activities including Bridge, Clay Pigeon Shooting, Golf and the annual Pancake Race held in Guildhall Yard.

Master, Wardens and Management of the Company

The Company is managed by its Court which comprises Officers (known as Master and Wardens), a number of Past Masters and Assistants which meets four times a year and is supported by a number of standing Committees which are listed at the beginning of this Yearbook.

A new Master and Wardens are elected each June and installed on or about St Matthew's Day (21 September) with a service in the Guild Church, the Priory Church of St Bartholomew the Great, or another church closer to the Hall at which the Installation Dinner is being held.

Finding out more about the City of London

A member of the Worshipful Company of Information Technologists (Paul D Jagger) has produced a very useful book *The City of London Freeman's Guide*. This guide is available for purchase online and has lots of useful information about the City and its traditions.

Other useful information may be obtained from:

The Company's own website

www.taxadvisers.org.uk

The Livery Committee website

<http://www.liverycommittee.org>

Masters

1995 - 1998	Roy L Jennings
1998 - 1999	Douglas J Pyne-Gilbert
1999 - 2001	Alderman Ian D Luder CBE
2001 - 2002	Michael B Squires
2002 - 2003	Peter W Murcott
2003 - 2004	Adam V B Broke OBE
2004 - 2005	Clive W Tulloch
2005 - 2006	Erica F M Stary
2006 - 2007	Iain P A Stitt
2007 - 2008	William V W Norris
2008 - 2009	Richard D Agutter
2009 - 2010	J Nicholas Woolf OBE
2010 - 2011	Barbara A Abraham
2011 - 2012	Peter Gravestock
2012 - 2013	Nicholas C Goulding
2013 - 2014	John R Dewhurst
2014 - 2015	Michael Godbee
2015 - 2016	Anthony Thomas
2016 - 2017	Kevin P Thomas
2017 - 2018	J Morag Loader
2018 - 2019	Marcus S P Fincham
2019 - 2020	Paul V Morton
2020 - 2022	Susan M Christensen
2022 - 2023	Bob Harland
2023 - 2024	Mike Gibbons MBE
2024 - 2025	Richard Geldard
2025 -	Matthew Peppitt

Clerks

1995 - 1996	Jonathan Crump
1996 - 2001	John Jeffrey-Cook
2001 - 2003	C Edward Lord OBE CC
2004 - 2017	Paul D Herbage MBE DL
2017 - 2022	Stephen C Henderson
2023 -	Robert Lowth CBE

Code of Conduct for Members

Introduction

1. The Company comprises Liverymen, Freemen, Honorary Liverymen and Honorary Freemen (together the "Members" and each a "Member"). Members delegate authority to the Court to advance the objects for which the Company is constituted, as set out in its Royal Charter, in such a manner as the Court and its Officers see fit.

Obligation

2. Each Member shall abide by the declaration and promise made on their admittance to the WCTA as a Freeman as follows: "You will be true to our Sovereign, The King, his lawful heirs and successors. You will do all within your power to maintain the independence and traditions of the City of London, and to establish and maintain the reputation of the Worshipful Company of Tax Advisers. You will be obedient to the Master and Wardens of the Company and observe and keep the lawful Ordinances and orders of the Company from time to time. You will support the charitable objectives of the Company and contribute to such benevolent or other funds as it shall maintain and use your best endeavours to attend the formal gatherings and social functions of the Company, and you shall as soon as practicable apply to the Court of Aldermen of this City to become of its Freedom."
3. Each Member shall abide by this Code of Conduct. Failure to abide by any of the principles below may result in the Court taking action to investigate and/or propose appropriate action to a WCTA Court Meeting, such as a resolution to remove the Member or Members in question, and/or inform a Member's professional body if considered appropriate.
4. It is expected that the sponsor of a candidate for admission to the Freedom of the Company will draw the candidate's attention to this Code with their candidate.

The Code

5. Standards of conduct are necessary to achieve and maintain the highest professional standards. The WCTA requires all Members to uphold the reputation of the Company and our Royal Charter as well as the reputation of the profession of tax advisers, and to abide by our Ordinances and Regulations.
6. Members shall not act contrary to the provisions or 'spirit' of the Charter as described above (and other governing documents of the Company). They shall comply with such policies as the Court, as the governing body of the Company, may adopt from time to time.
7. Members shall not misrepresent, to others outside the Company, their status or standing within it.

8. Members shall ensure their online presence does not reflect views that are incompatible with this Code, notwithstanding Members may hold differing views on issues of the day.
9. Members shall act in good faith toward the WCTA and powers exercisable by the Members under the Company's governing documents shall be exercised in good faith in the interests of the WCTA.
10. Members shall exercise their professional skill and judgement to the best of their ability and must act in all matters towards their clients, employers, and all others with whom their work is connected in an honourable and ethical way in keeping with these high professional standards.
11. Members shall treat fairly and with respect and honesty all those with whom they have dealings in their capacity as Members, whether they be fellow Members, their guests, colleagues, clients, or others. They shall ensure that other Members, potential Members, and guests feel comfortable, valued, and included, irrespective of age, disability, gender, marriage and civil partnership, pregnancy and maternity, race, religion or belief, sex and sexual orientation, and all characteristics currently protected in law.
12. In their capacity as Members (for example: when attending events, serving on committees, acting as Company office holders, etc), individuals shall act without bias, without vested interest and in accordance with the established rules of behaviour appropriate for the circumstances and, above all, in keeping with the customs and standards of behaviour expected by the WCTA. Sources of potential conflicts of interest shall be declared, where possible, in advance of their arising.
13. Members shall ensure that their conduct (and the conduct of any guests they may entertain) at Company events is neither damaging to the good name and reputation of the WCTA, nor its effective administration by the Court.
14. Members shall treat employees, volunteers, and guests of the WCTA (and the employees, volunteers and guests of other organisations and groups with which the WCTA is involved from time to time) with respect and courtesy at all times. They shall encourage any guests they may entertain at Company events to do likewise.
15. Members are to ensure they, and their guests at Company events, are aware of and respect the ethos and values of the company, including the standards of conduct expected of its Members and their guests.

Procedures

16. The WCTA actively encourages anyone who interacts with the Company, its Members, or guests, in whatever capacity, to report any concern about inappropriate behaviour at Company events or on other such occasions. The WCTA will take every such report seriously and treat the matter sensitively.

17. Concerns about inappropriate behaviour, of a Member or a guest, at a Company event or otherwise while conducting the Company's affairs, should be referred promptly to the Clerk or, in the absence of the Clerk, to the Master (or, in his or her absence, Deputy Master).
18. If:
- a. the issue is regarded as minor, and is uncontested; and
 - b. the behaviour of the Member in question, or that of the guest as applicable, has never before been deemed inappropriate;
- then the Clerk will present the facts to the Master (or, in his or her absence, to the Deputy Master) and recommend that he or she communicates displeasure, in writing, to the Member whose behaviour, or that of whose guest as applicable, has been deemed inappropriate.
19. If:
- a. the issue is other than minor, or is contested; or
 - b. the behaviour of the Member in question, or that of whose guest as applicable, has previously been deemed inappropriate;
- then the Clerk will refer the matter to the Master (or, in his or her absence, to the Deputy Master), who is likely to discuss the matter with one or more of the Wardens or Court Assistants. After they have considered the matter in the light of the Ordinances, the Master will present options for any further action to the Court for a decision.
20. A Member who is alleged to have breached the Code of Conduct may, in any associated interactions with the Company, its Court, or other representatives, be accompanied by a witness of their choosing.
21. The authority of the Court, in relation to this Code of Conduct, is prescribed in the Ordinances, as follows (extracted from Ordinances 9 and 10, as at 2014 (updated 2022)):
- a. The Court, in its absolute discretion, by a resolution passed by not less than three-quarters of the Members of the Court present and voting, shall have the power to determine the membership of any Member [...] whose conduct, in the opinion of the Court, is detrimental to the interests of the Company or otherwise renders him or her unfit to continue as a Member. Alternatively, the Court, in its absolute discretion, may impose such a lesser penalty or restriction as it considers appropriate under the circumstances.
 - b. Before any of the powers given to the Court [...] are exercised, the person concerned shall be given the opportunity of being heard either by the Court itself or by a Committee thereof and not less than 14 days' notice shall be given to every Member of the Court of the meeting at which the proposal to exercise any such powers is to be considered..

Dress code and etiquette within the City of London

Liverymen and Freemen may wonder precisely what is meant by the different descriptions of dress that will appear on invitations or notification of events. It should be remembered that although in recent years there has been a certain amount of liberalisation about what is and isn't acceptable, the City of London and its Livery Companies have retained more formality than elsewhere.

Day attire

For most Livery functions that take place during the day a lounge suit or for ladies business attire is usual. It would also be usual for men to wear their Livery Company tie and in the case of Liverymen your lapel pin. When attending morning or afternoon church services in the City, ladies will often be found wearing a hat or fascinator.

On occasions however, particularly when the Lord Mayor or Members of the Royal Family are present the invitation will state **Morning Dress**.

For gentlemen this means white shirt with turn down collar, livery tie, **black** waistcoat, **black** morning tailcoat and striped trousers.

For ladies this means a smart suit or dress and jacket. A hat should normally be worn if Morning Dress is indicated unless instructed otherwise.

Evening attire

There are two forms of dress usually worn at formal Dinners within the City and these will usually be described on your invitation or pour memoire card – Dinner Jacket (sometimes referred to as Black Tie) or Evening Dress (White Tie)

Dinner Jacket

For gentlemen this means a white dress shirt with turn down collar, black bow tie, black dinner jacket and black evening trousers, black socks and black shoes (ideally patent evening shoes). Any waistcoat or cummerbund worn should be black and not coloured.

(You should be aware that some Companies have produced special cummerbunds with their Livery badge and in one instance Liverymen wear a particular coloured Dinner Jacket)

For ladies this means cocktail or evening dress. The dress does not have to be full length but very short dresses are not appropriate. Some trousers/trouser suits are also appropriate. Shoulders however are to be covered either by the dress itself or by a suitable jacket or wrap. Any skirts should be modest [i.e no long slits].

Evening Dress

For gentlemen this means white Marcella / Linen dress shirt with stiff front and wing collar, white bow tie and white Marcella waistcoat, black evening tailcoat, black evening trousers, black socks and black patent shoes.

For ladies this means a full length evening dress, ensuring shoulders are covered, and without immodest slits. Wearing of gloves is now less common but strictly correct for "state occasions" and when attending Glovers' Company events. For certain City Dinners that have the designation "state occasions" tiaras may be worn.

National costume

Correctly worn national costume is an acceptable alternative at most City evening functions.

Wearing of Badges and Decorations

Badges

The Master, Past Masters, Wardens and Court Assistants should wear their badges upon a neck riband if advised "with badges" for events organised by the Company. If you are invited as a personal guest to another Livery Company, Ward Club or other City Institution, clear advice should be sought from your host. It is only usual to wear your badge if specifically invited as a guest of the other Company as a formal WCTA representative.

Decorations

These are usually only worn with Evening Dress, although occasionally you will see "Dinner Jacket with Decorations". Any medals worn (on the left side) should be miniature and be mounted in order of precedence (Further advice available from the Clerk). Occasionally full-size medals are worn with Morning dress (mainly for state events, or those organised by Orders of Chivalry) or with a lounge suit (Remembrance events organised by the Royal British Legion).

Etiquette at Luncheons and Dinners

Most invitations will clearly indicate the start times of these events. You should generally aim to arrive in time to comfortably attend the Reception before being called to take your seat for the meal. You should avoid getting up from your seat until after the Loyal toast and apart from the most exceptional circumstances you should not leave the event until after the Master and Principal guests have retired from the table.

Mobile phones

Mobile phones should be switched to silent mode when attending formal meetings, Church Services, Luncheons and Dinners organised by Livery Companies and other City institutions. Members are also reminded that sending text messages or using other forms of social media is not considered appropriate at these occasions.

Photography

During the course of membership of the Company you will often get access to splendidly decorated Livery Halls and other unique venues. Please ensure that you seek advice on whether or not photographs either with a camera or your mobile phone may be taken. You are reminded however that the actual taking of photographs during luncheons and dinners is regarded as a serious breach of etiquette.

Companies will often engage official photographers to record their events and copies may usually be obtained afterwards for a modest charge.

Guests

As a Company member you will have an opportunity to bring guests to certain of the Company's formal functions. It is your responsibility as part of their overall enjoyment of the occasion to ensure that they are fully aware of the Civic City's expectations in terms of dress and general etiquette.

Graces

The Company's Grace

Omnipotens et sempiterne Deus, cuius beatus Filius, in Bethlehem propter censum tributarium natus, Matthaeum publicanum in servitium suum vocavit, neque cenam Zachaei publicani alterius despexit, gratias agimus tibi propter omnia beneficia tua, qui vivis et regnas in omnia saecula saeculorum. Amen

(Almighty and everlasting God, whose blessed Son, born in Bethlehem because of a tax census, called to his service Matthew the tax gatherer, and did not despise the dinner of Zacchaeus, another tax gatherer, we give you thanks for all your acts of kindness, who lives and reigns for ever and ever. Amen. Luke 2, i; Matthew 9, ix; Luke 19, v)

The Sung Grace

To be sung by all present

The musical notation is written on four staves in a single system. The key signature has one flat (B-flat) and the time signature is common time (C). The melody is simple and homophonic, with lyrics written below the notes. The lyrics are: 'For these and all Thy mer - cies giv - en, We bless and praise Thy name, O Lord; May we re - ceive them with thanks - giving, Ev - er trust - ing in Thy Word: To Thee a - lone be hon - our glo - ry, Now and hence forth for ev - er - more. A - men'.

For these and all Thy mer - cies giv - en, We bless and praise Thy
name, O Lord; May we re - ceive them with thanks - giving, Ev - er
trust - ing in Thy Word: To Thee a - lone be hon - our
glo - ry, Now and hence forth for ev - er - more. A - men

From the 'Laudi Spirituali', A.D. 1545

The Loving Cup

The Loving Cup is an ancient and interesting feature of the banquets of the City Guilds. It derives from the assassination at Corfe Castle on 18 March 978 of King Edward the Martyr by his stepmother, Elfrida, to enable her son, Ethelred (the Unready), to take the throne. The 17 year old King returned thirsty from a hunt; Elfrida invited him to drink from a two-handled cup, and one of her men stabbed him while he was defenceless. Thereafter, anyone who stood up to drink required a companion to guard him against such treachery.

The City tradition is that immediately after dinner and Grace, the Master and Wardens bid their guests a hearty welcome and drink to them in a Loving Cup. There are slight variations between different Companies. What follows is the custom of the Tax Advisers.

When your neighbour turns to you with the Cup you rise, **bow** to each other, **lift** the cover with your right hand (the dagger hand) and hold it aloft with a flourish. Your neighbour drinks and wipes the rim with the napkin; you **replace** the cover, both **bow** again and **take** the Cup.

You turn to your second neighbour who rises, exchanges bows and lifts the cover. You **drink** and **wipe** the rim: the second neighbour replaces the cover, you again both **bow** and pass the Cup to the second neighbour. You then **turn** back to back to protect the drinker, allowing your first neighbour, who has been protecting your back, to sit. You **sit** when your second neighbour has finished.

Note: Only three people in any group near a loving cup should be standing at any one time. You should not stand until approached by your neighbour holding the cup. When attending Livery functions with other Companies you should enquire of your host any special instructions for this ceremony pertaining to that Company.

The tradition of the Loving Cup was suspended in the light of the Covid-19 pandemic but has now resumed using Chocolates. The tradition is described here as it has been a welcome feature of Livery dinners and banquets since ancient times.

The Coat of Arms

The Arms were granted to the Company in 1999 and the Supporters in 2004.

The blue of the shield symbolises the River Thames, the heart of the City of London. The cross represents the Roman X or ten, indicating the tithe or tenth paid in ancient times, chequered to reflect the Court of Exchequer that used counters on a squared tablecloth. The chain symbolises the links of fellowship between the Company's Liverymen. Above the helm, the owl, as in the Arms of the Chartered Institute of Taxation to which many of the liverymen belong, represents wisdom, and extends the purse of charitable provision.

Both supporters are mythical creatures. The Griffin combines the attributes of the king of the beasts and the king of the birds, with the body and ears of the lion and the head, wings and talons of the eagle. Associated with the gods of Minos and Greece, it was an animal of the sun and of justice and was guardian of treasure.

The Pegasus was the winged steed of Apollo, so it is largely connected with intellectual arts. Used by the Knights Templar, it became the symbol of fame, eloquence and contemplation. The plants, thrift and London pride, grow from the bank on which the Supporters stand.

The motto ***Veritas, Caritas, Comitas*** (*Truth, Charity, Fellowship*) reflects the Company's three basic aims: to represent a profession that stands for truth in its dealings, to distribute charity, and to provide fellowship for all tax advisers.

Fines and Quarterage as at September 2025

Fines	£
<i>On admission to the Freedom</i>	
Aged under 30	240.00
Aged 30 and over, but under 35	290.00
Aged 35 and over, but under 40	340.00
Aged 40 and over, but under 45	390.00
Aged 45 and over	440.00
Overseas residents	200.00
<i>On advancement to the Livery</i>	300.00
<i>On election as an Assistant</i>	350.00
<i>On election as Renter Warden, Middle Warden, Upper Warden or Master</i>	350.00
Quarterage	
Payable in July each year:	
Liverymen and Freemen resident in UK	425.00
Liverymen and Freemen resident overseas	210.00
Liverymen and Freemen aged under 40 years on 1 July 2025	210.00

Notes

1. The first year's quarterage for a new member is reduced based on their date of admission. For example, a Freeman admitted in September will pay 75% of the rate for the full year.
2. The first year's quarterage for a new member can be paid in quarterly instalments based on their date of admission. Please apply to the Treasurer for further details.
3. All fees are inclusive of VAT at 20%.

Charitable Donations

Company Freemen and Liverymen support the Company's two related charities:

The Tax Advisers' Benevolent Fund. "Registered Charity No. 1049658" supporting members of the tax profession both personally in times of hardship and in the advancement of tax education.

Tax Advisers' Charitable Trust. "Registered Charity No. 1064392" supporting charities connected to the City of London and surrounding Boroughs, the tax profession and organisations to which the Company is affiliated.

Being a new Company, there are no substantial endowments upon which to call and hence all members are expected to contribute generously to one or both of the funds to enable the charities to fulfil their objectives. The trustee of each charity is the Company. The activities of the charities are overseen by the Charities Committee which comprises certain members of the Court of the Company and certain members of the Company experienced in charitable matters.

All Freemen and Liverymen are expected, under their oath of admission, to commit to an annual contribution to one or both charities. A suggested benchmark is that donations match the level of annual quarterage. The principal ways that regular payments can be made are as follows:

- By Direct Debit using GoCardless
Direct Debit via GoCardless is used by The Worshipful Company of Tax Advisers to collect annual payments for quarterage. We have set up a new GoCardless account specifically dedicated to the Tax Advisers' Charitable Trust. The GoCardless mandate can be changed at any time. The link is below:

<https://pay.gocardless.com/AL0005MVC4JB43> Tax Advisers' Charitable Trust

<https://pay.gocardless.com/AL0005MVCARBW3> Tax Advisers' Benevolent Fund

- By Standing Order.
A new Standing Order can be set up straightforwardly from an online bank account using the bank details shown below:-

HSBC Sort Code: 40-03-17 Account No: 0113 4493 Tax Advisers' Charitable Trust

Barclays Sort Code: 20-41-50 Account No: 3304 5218 Tax Advisers' Benevolent Fund

Gift Aid

Taxpayers are invited to sign a Gift Aid Declaration which allows the charities to reclaim the tax on any donations. This boosts the amount of funds available for charitable causes by 25p in every £1 at no extra to the donor. Higher-rate taxpayers can reclaim from HMRC the difference between the standard rate and any higher rate tax they pay. There is also have the option of paying over this reclaim to the charity. A gift aid declaration can be found on our website at www.taxadvisers.org.uk. The completed form should be forwarded to the Charities Treasurer, Liveryman Bill Dodwell.

Company merchandise

Liverymen and Freemen may buy the following items from the Administrative Officer:

	£
Company tie in navy blue	36.00
Company tie in burgundy red	36.00
Ladies' Company brooch	36.00
Ladies' Company scarf in navy blue	20.00
Company cufflinks (enamel crest on silver with chain link)	40.00
Company Liveryman's lapel pin (available to Liverymen only)	50.00

The above prices are inclusive of VAT but exclude Postage and Packing which will be charged at rate incurred.

The Worshipful Company of Tax Advisers

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