



B Lab Statement on Your Finance Team's B Corp Certification

B Lab's independent Standards Advisory Council has rendered the following decision and guidance regarding eligibility for B Corp Certification for companies providing tax advisory services:

"Companies in the tax advisory industry are eligible for B Corp Certification if they are able to confirm that their tax philosophy, used to provide services and recommendations to clients, aligns with the company specific principles listed in B Lab's framework, specifically, 1) the tax advice provided appropriately reflects the actual amount of income generated by the client over time; and, 2) the tax advice provided to a client for a jurisdiction appropriately reflects the actual operations of the client in that jurisdiction."

Your Finance Team is required to disclose a summary of how it complies with the above requirements as a part of its B Corp Certification. For more information on the review process, please refer to B Lab's position statement on Companies that Provide Tax Advisory Services and B Corp Certification [here](#).

Summary of Company

Your Finance Team Limited provides outsourced finance services, which include tax advisory services for small and medium enterprises (SME), and for individuals, in the United Kingdom (UK) only. The company shared that 36% of its annual revenue comes from Tax Advisory services provided to SMEs. Fees are charged at a flat rate. Compliance services include the preparation and submission of personal and corporate tax returns, ensuring clients meet their statutory obligations accurately and on time. These services cover income tax, corporation tax, capital gains tax and value added tax amongst others.

Your Finance Team's Policies and Practices

In alignment with the requirements and principles stated in B Lab's position statement for companies that provide tax advisory services, Your Finance Team has a philosophy statement for the tax advice that they provide to their clients and their own engagement with governments and tax regulators, which has been shared with all their employees. The philosophy statement reads as follows:

Your Finance Team is proud of our status as a Certified B Corp. As part of that commitment and in recognition of the role that taxes play in contributing to a healthy society, we use our professional judgment to provide advice regarding tax positions with multiple potential interpretations that accurately reflect the genuine economic substance of our clients' operations and income over time. We do not advise clients to take a position unless we believe it has at least a reasonable basis for being sustained by applicable tax authorities. If a client takes a tax



position despite our advice to the contrary, we reserve the right to disengage from the relationship. In accordance with this tax philosophy, we engage with government and tax authorities on a collaborative basis and would provide feedback on consultations or expert panels where required. We maintain compliance with this policy through regular training of our employees, internal policies on conduct, engagement documentation with our clients, and client retention reviews.

Company policies and practices for risk mitigation

Your Finance Team is regulated by the Institute of [Chartered Management Accountants](#) (CIMA) and follows its [Code of Ethics](#). As an accountancy firm in the UK, the firm is required to be registered with a professional body or [HM Revenue & Customs](#) under the money laundering regulations procedures before engaging new clients and periodically throughout their time as clients. As such, the company adheres to strict anti-money laundering regulations, which involve verifying the identity of the beneficial owners of companies and those that they provide tax services to. The company's obligations are outlined [here](#). The firm also offers compulsory Anti-Money Laundering training to its staff, which must be completed every two years.

The firm does not support or tolerate tax evasion. It is bound by the [Criminal Finances Act 2017](#), which makes the facilitation of tax evasion a criminal offence. Your Finance Team has a strict Taxation Services Policy to not promote or design any tax avoidance schemes. Where a client chooses to use such a scheme, depending on its nature and whether or not there is a valid non-taxation reason for using the scheme, the firm is committed to declining to act for the client.

Your Finance Team does not have any policies related to low tax jurisdictions because it has no clients operating in such jurisdictions. The firm's position is, however, covered by its Taxation Services Policy, which states that any advice the firm gives will take into account the commercial (business or practical) purposes of any proposed activity. Your Finance Team is guided by an internal Code of Ethics and [CIMA's professional Code of Ethics](#), both of which apply to all areas of the business. Tax practices are governed by a dedicated Taxation Services Policy, ensuring responsible and transparent compliance. All employees are required to read and sign these documents, which are enforced internally through management oversight and company-wide policies. To prevent potential conflicts of interest, the company reports that it does not hire employees from government agencies.

Government affairs and lobbying

The regulatory environment is well established in the UK, and tax advisory firms are expected to operate within clear legal and professional standards. Your Finance Team hasn't faced any litigation, penalties, or enforcement action relating to its tax advisory services. The company does not publicly declare an advocacy position, and it is not involved in lobbying.



B Lab's Public Complaints Process

Any party may submit a complaint about a current B Corp through [B Lab's Public Complaint Process](#). Grounds for complaint include:

1. Intentional misrepresentation of practices, policies, and/or claimed outcomes during the [certification process](#), or
2. Breach of the core values articulated in our [Declaration of Interdependence](#) within the B Corp Community.