

Self assessment service plans



	Self assessment	MTD Filing	MTD Core	MTD Plus
	Great for annual self assessment returns	For taxpayers wanting a simple filing service	Perfect for small sole traders	Perfect for larger sole traders and partnerships who are VAT registered
Record keeping	Bespoke - spreadsheet, app or other as you choose	Spreadsheet provided by us	QuickBooks Online	QuickBooks Online
QuickBooks Online set up and training			✓	✓
Quarterly review			✓	✓
Quarterly management accounts				✓
MTD ITSA submissions		✓	✓	✓
EOPS & final declaration / self assessment return	✓	✓	✓	✓
Payroll for staff			✓ Additional fee	✓ Additional fee
Capital Gains Tax calculation	Additional fee	Additional fee	Additional fee	Additional fee
VAT review and returns				✓
Accountant references (eg for mortgage purposes)	✓	✓	✓	✓
Regular Budget, tax and business updates	✓	✓	✓	✓
Free HMRC tax investigation insurance	✓	✓	✓	✓

More complicated returns with other sources of income/capital gains will require separate agreement. All plans and services subject to an agreed engagement letter.