

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 a 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.