

Limited company service plans



	Annual	Starter	Momentum	Advance
	Great for simple companies that just need the basics covered	Perfect for early stage start ups, personal services companies or smaller companies	Additional services to support VAT registered and growing companies	Our bespoke tier for established and larger companies
Statutory financial statements preparation & filing	✓	✓	✓	✓
Corporation Tax return preparation & filing	✓	✓	✓	✓
Management accounts & financial commentary		✓ Quarterly	✓ Quarterly	✓ Quarterly / monthly
Advanced reporting (incl. better reports, analysis against budget etc.)				✓ Quarterly / monthly
VAT return preparation & filing			✓	✓
QuickBooks Online set up, training & support		✓	✓	✓
Payroll <i>Inclusive payroll per month. Additional payrolls can be added on demand</i>		✓ 1 director / employee	✓ 2 directors / employees	✓ As required
Director self assessment <i>Additional self assessments can be added on demand</i>		✓	✓	Optional add on
Annual confirmation statement & key data changes	✓	✓	✓	✓
Company secretarial services (eg updates for new share issues)			Optional add on	Optional add on
Tax, business and growth advice		✓	✓	✓
Quarterly in person business review			✓	✓
Director references (eg for mortgage purposes)		✓	✓	✓
Regular Budget, tax and business updates	✓	✓	✓	✓
Free HMRC tax investigation insurance	✓	✓	✓	✓

Additional services such as R&D tax credit claims, EIS / SEIS applications can be added as required. Payroll includes workplace pension submissions. Director self assessments assumed to be simple with primarily PAYE and dividend income. More complicated returns with other sources of income/capital gains will require separate agreement. All plans and services subject to an agreed engagement letter.