

Making Tax Digital



Making Tax Digital is transforming the way businesses and individuals report tax to HMRC

Our MTD plans are designed to provide clear, compliant, and practical support — whether you simply want help with filing or are looking for deeper insight and advisory support.

We offer three structured service levels so you can choose the support that best fits your business, your confidence with bookkeeping, and the level of insight you want from your numbers.

Plan descriptions

MTD Filing

This option is designed for confident clients who are comfortable managing their own records and simply want professional support to meet their HMRC filing requirements.

In this plan, you maintain your financial records using spreadsheets and we handle;

- MTD ITSA quarterly submissions
- End of Period Statement (EOPS)
- Final declaration submission

This is a compliance only service with minimal intervention.

MTD Core

MTD Core is designed for clients who want reassurance, structure, and support without fully outsourcing their bookkeeping.

This service includes:

- Set up of HMRC-compatible software (QuickBooks)
- Initial software training
- Ongoing support with digital record keeping
- High-level quarterly reviews to identify errors or omissions
- All MTD ITSA submissions, EOPS, and final declaration

It provides peace of mind that your records and submissions remain compliant throughout the year.

What is Making Tax Digital?

Making Tax Digital (MTD) is HMRC's initiative to modernise how unincorporated businesses and some tax payers report their taxes. It requires taxpayers to:

- Keep digital records
- Use HMRC compatible software
- Submit quarterly updates to HMRC rather than file a single end of year tax return

MTD Plus

MTD Plus is designed for VAT-registered sole traders who want more than compliance — they want clarity, insight, and regular advice.

In addition to everything included in MTD Core, this service provides:

- VAT review and VAT return preparation
- Quarterly management accounts
- Quarterly advisory meetings to review performance
- Support focused on decision-making, cash flow, and tax planning

This service turns MTD reporting into a valuable management tool rather than a compliance burden.

Pricing and next steps

Our MTD plans are available as monthly payment schemes and are tailored to your business size and precise requirements. For example we can add payroll for staff as you need.

If you would like help choosing the right service level or want to discuss your MTD obligations please contact us for a no-obligation discussion.

Making Tax Digital



Our plans in summary

	MTD Filing	MTD Core	MTD Plus
	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	Spreadsheet provided by us	QuickBooks Online	QuickBooks Online
QuickBooks Online set up, training and support		✓	✓
Quarterly review		✓	✓
Quarterly management accounts			✓
MTD ITSA submissions	✓	✓	✓
EOPS & final declaration	✓	✓	✓
Payroll for staff		Additional fee	Additional fee
Capital Gains Tax calculation and return if required	Additional fee	Additional fee	Additional fee
VAT review and returns			✓
Accountant reference	✓	✓	✓
Updates, insurance and other benefits	✓	✓	✓