

SERVICE LEVEL PACKAGE SCHEDULE - COMPANIES

Service Level	Simple Start	Essentials	Best value	Unlimited
			Plus	
Compliance				
Preparation of Management Accounts	Quarterly	Quarterly	Quarterly	Monthly
Preparation and filing of Annual Accounts with Companies House	•	•	•	•
Preparation and filing of Annual Corporation Tax Return with HMRC	•	•	•	•
Preparation and filing of Confirmation Statement with Companies House	•	•	•	•
Company administration: Director, Shareholder, PSCs, registered address, year-end date changes		•	•	•
Tax applicability reviews, e.g. VAT, CIS, ATED		•	•	•
Annual Tax on Enveloped Dwellings (ATED) filings with HMRC			•	•
Tax Reduction Activities				
Tax-deductible expense optimisation		•	•	•
Director loans management - Optimising interest, drafting agreements, preparing CT61s		•	•	•
Dividends management - Optimising amounts, drafting dividend vouchers & Board minutes		•	•	•
Annual tax planning review			•	•
Business (re)structuring: Company formations, brand new group structure implementations, share-for-share exchanges for new groups/companies etc. that no do require HMRC clearance.			•	•
Complex Business restructuring: Group restructuring, share-for-share exchanges etc. that require HMRC clearance				•
General support				
Email / video call support		•	•	•
QuickBooks training and ongoing support		•	•	•
Accountant's letters to banks, lenders etc.			•	•
Reduced VAT rate letters to suppliers			•	•
Special projects, for example:				
Legal structure planning & analysis, e.g., property ownership via personal vs limited company (conversational)			•	•
Legal structure planning & analysis, e.g., property ownership via personal vs limited company (documented)				•
Development of capital gains / inheritance planning strategies				•
Financial projections				•