

SERVICE LEVEL PACKAGE SCHEDULE - INDIVIDUALS

Service Level	Simple Start	Essentials	Best value	
			Plus	Unlimited
Compliance				
Preparation of Management Accounts	Quarterly	Quarterly	Quarterly	Monthly
Preparation and filing of Annual Personal Tax Return with HMRC	•	•	•	•
Tax applicability reviews , e.g. VAT, CIS		•	•	•
Tax Reduction Activities				
Tax-deductible expense optimisation		•	•	•
Annual tax planning review			•	•
Year-round support, general queries and other miscellaneous activities				
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				•