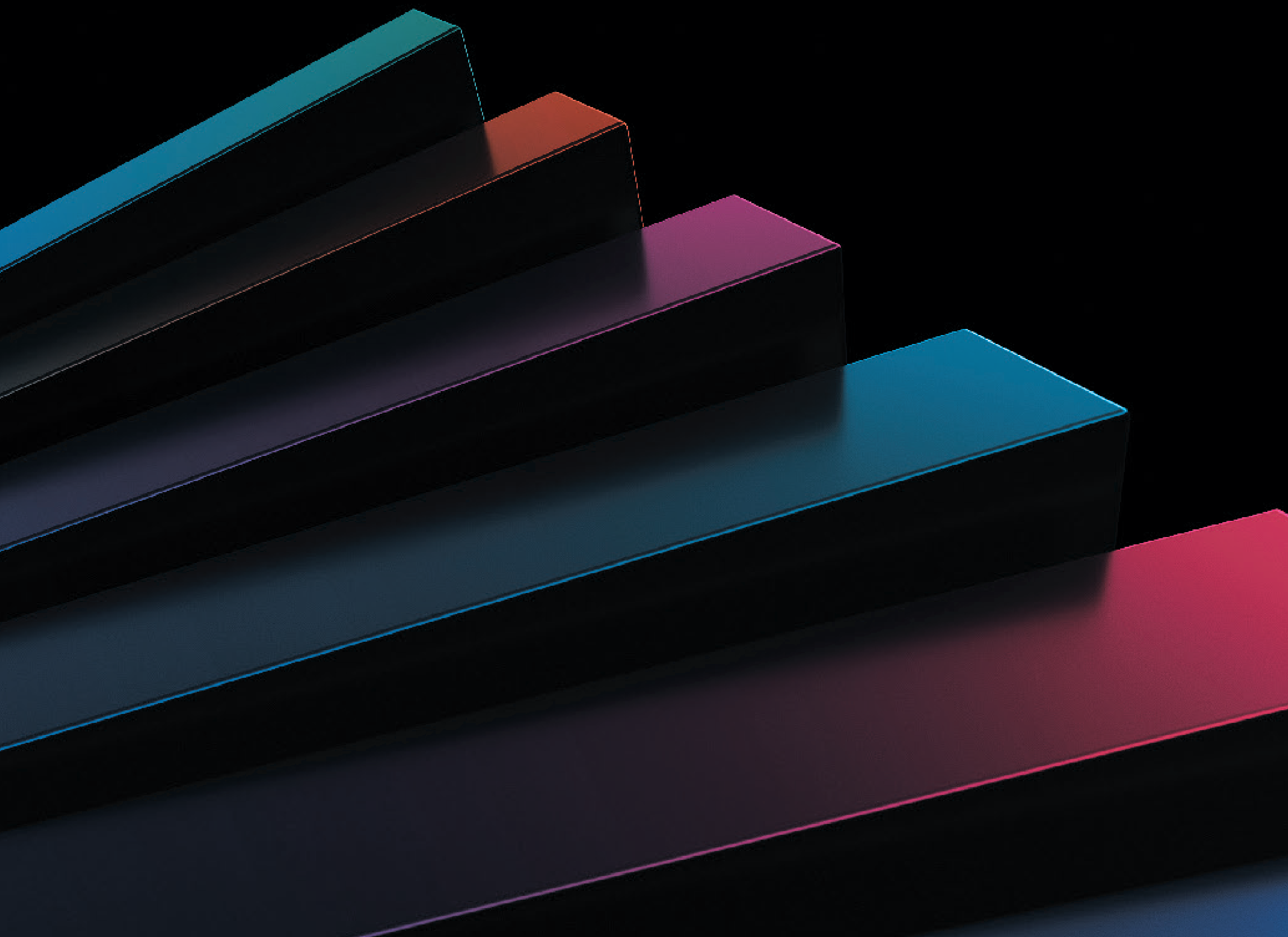
When the game changes, change the game.



taxcalc®

Software that grows as you do

2019

Product Brochure

taxcalc.com

“Its simplicity won me over”

Georgia Duffee heads up Benedetto Accounts and Tax, a three-year-old, single partner firm based in Southend-on-Sea with 50 clients. Since starting up, the firm has doubled its client base year-on-year. We asked Georgia what led her to choose TaxCalc and how it will support her ambitions to grow.

Where do you see your practice in ten years?

By then we hope to have a second office in the West Country. The industry will be very different by then, so it's important to have the right processes and infrastructure in place now to accommodate for future change. MTD for VAT will not be as big a change as MTD for Income Tax, so we are focusing on the bigger challenge.

What made you choose TaxCalc?

We chose TaxCalc after a bad experience with a more expensive brand on the market. I was impressed from the moment I made my first enquiry. TaxCalc offers a demo version of the software. I purchased the full licence a week into the demo. I haven't looked back!

What made you switch from the other provider?

We switched because the onboarding support provided by the other company was unsatisfactory. There was a three week waiting list, so they suggested I installed myself – which I did. Although the product was working, I couldn't run reports. It took 10 weeks for them to remotely install the software for me, by which time I'd also lost interest. I gave up and moved to TaxCalc. TaxCalc works out at 37% of the cost of the first provider I went with. There were no hidden costs or add-ons I needed to buy.

“There were no hidden costs or add-ons I needed to buy. What I like is that the pricing is transparent, honest and flexible”

Georgia Duffee, MAAT, Benedetto Accounts and Tax

What features in particular have been of benefit?

Its simplicity won me over. The SimpleStep tool takes you through the steps needed to accurately complete the accounts or tax return and is very simple and straightforward. It also gives me peace of mind that I'm delivering the best service to my client and producing work free from errors. Since adding my clients onto TaxCalc I'm able to track everyone's deadlines through the Client Hub feature, which is free. This gave me one less thing to worry about as I had been manually tracking deadlines. Client Hub sends me deadline notifiers, which gives me peace of mind. It took just one day to add my whole client base – and now I just add a new client as they come onboard. The step-by-step wizard helps you fill in all the information you need without missing any vital data.

Has TaxCalc improved your workflow?

Definitely. The manual practice management system I had before meant I couldn't grow confidently because I felt like I would lose track of the deadlines and my responsibilities. However, now I know that Client Hub is managing the deadlines and tasks – I feel really comfortable and motivated to get out there and aim to grow to 100 clients in the next 12 months.

Would you recommend TaxCalc to a colleague or fellow practitioner?

I've been recommending TaxCalc to my network – and will continue to do so.

“MTD for VAT – sorted thanks to TaxCalc”

Shaun Vickery,
SMV Associates

SMV Associates has more than doubled in size over the past three years. Shaun Vickery decided to implement TaxCalc to allow not only for growth, but also to meet the challenges of continual legislative change – most recently the introduction of MTD for VAT. Shaun explains how TaxCalc helped the firm transition to the next level.

What was your previous set-up?

In the past, we had separate packages for tax returns, accounts preparation and company secretarial functions and no specific practice management system. That had to change.

What made you choose TaxCalc?

We trialed TaxCalc’s Tax Return Production software, found it simple to use and decided to take the plunge. Obviously, this was a big step for us, as we’d used our existing tax production software for a number of years.

Where do you see your business in the next ten years?

We’ll shortly be breaking the 1,000 entries barrier and see no reason why TaxCalc can’t take us past 5,000 and beyond over the next 10 years.

How have you prepared for MTD?

With the introduction of MTD, we were concerned about dealing with clients who preferred not to use accounting software. TaxCalc informed us about their bridging software, TaxCalc VAT Filer.
We decided to sign some clients up to their MTD submission beta trial. Once the software was ready, we filed the very first MTD for VAT submission through TaxCalc back in November 2018. The system was very easy to use and the submission went through with no problems at all. Thanks to TaxCalc bringing MTD-ready VAT Filer to market promptly, we’ve been able to get ahead of the game and have almost all clients ready to file through MTD.

What features or benefits attracted you to TaxCalc?

Job tracking, handy reports, engagement letter generation, Money Laundering / GDPR registers... New staff pick up the systems very quickly as the layout and style of each package have a common look.

Would you recommend TaxCalc to a colleague or fellow practitioner?

We’d certainly recommend any other practices looking for new accounting software to take a look at TaxCalc!

“CloudConnect made us switch”

Stephen Paul,
Valued Accountants

Valued Accountants has its sights set firmly on the future. Adopting Cloud technology has been a strategic decision to service clients. Currently Valued has offices in Consett and Newcastle, boasts 17 staff and services over 1,500 clients. But they’re not stopping there.

Where do you see your practice in ten years?

In the same way that we have evolved since 2011, we see ourselves continuing to innovate, so will be a very different practice in the coming years.

What made you choose TaxCalc?

Our decision to switch to TaxCalc was easy. For many years we had invested significantly in larger solutions with a hefty price tag, and didn’t really see the return on that. TaxCalc gave us the same and more for approximately half of what we were paying – and for fewer concurrent users. We were won over by TaxCalc’s ease of use, support and sheer value for money. In terms of training, the product was also much easier for the team to acclimatise to. It was a no brainer.

What features or benefits attracted you to TaxCalc?

Because everything is integrated, TaxCalc offers a single one-stop shop for products and allows us to scale up our business as we take on more clients.

Your business is Cloud-based. Has CloudConnect delivered?

Yes – our business is based solely in the Cloud and CloudConnect was a significant factor in our decision to switch to TaxCalc.

If you’ve called our Support line, how was your experience?

Fantastic – they have been brilliant and we cannot praise the team enough. Thankfully we haven’t needed them often but when we have they have been amazing.

Would you recommend TaxCalc to a colleague or fellow practitioner?

Absolutely – point them in our direction!

taxcalc®

One integrated platform

Compliance Services Features

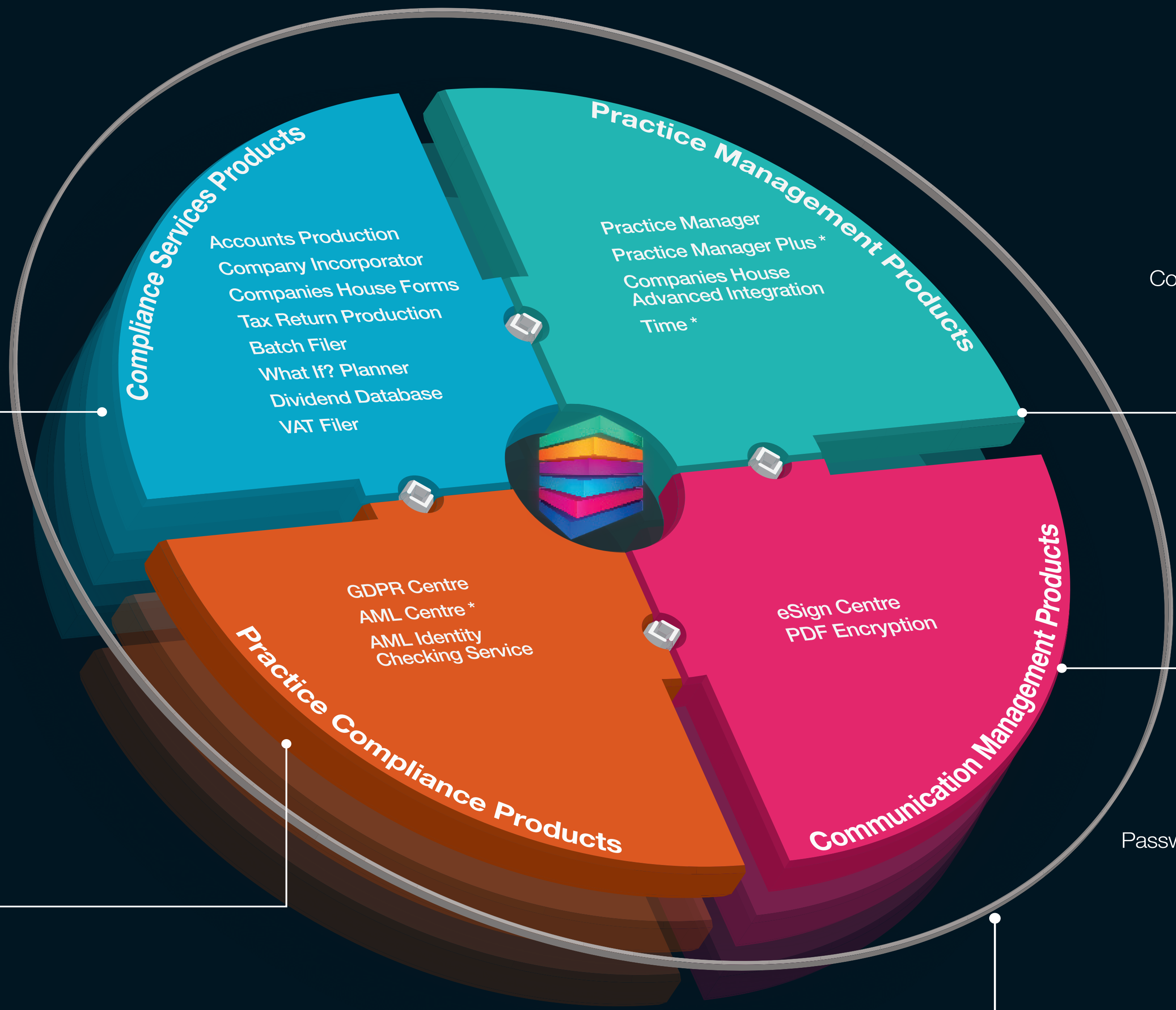
Financial Statements
Partner Product Integrations
Corporation Tax Returns
Partnership Tax Returns
Self Assessment Tax Returns
Trust Tax Returns
HMRC Data Fetch
Batch Filing

Tax What If? Planner
Dividend Database
VAT Returns MTD
Incorporations
Statutory Forms
SimpleStep®
Check & Finish
Smart Data Entry Wizards
Electronic Filing

Practice Management Features

Dashboards & Widgets
Client Management
Companies House Integration
Client Engagement
Data Mining

Task Management
Report Manager
Staff Management
Multiple Dashboards *
Time Tracking *
Advanced Workflow *



Practice Compliance Features

GDPR Checklists and Registers
GDPR Subject Access Requests
Record Data Breaches

AML Firm-wide Compliance *
Client Due Diligence *
AML Electronic ID Checks

Communication Management Features

Mail Merge Templates
Password Protected Documents

Electronic Signatures
Envelope Management

"TaxCalc has everything I need.
A client database, Accounts Production
and Tax Return Production, all in one place"

CloudConnect

Data Storage in the Cloud
Access TaxCalc from anywhere

* Coming soon

CloudConnect®

Fast. Familiar. Secure.

"Great software and so easy to use. TaxCalc CloudConnect makes life even easier"

The Cloud without compromise

CloudConnect, our unique Cloud service, frees you and your staff to work remotely using TaxCalc desktop software. If you're a growing practice, you can use it to connect and share data with colleagues without having to invest in costly IT infrastructure such as servers. It's secure and highly flexible – which means you can be too.

Overview

Use the same great software you know and love while your data is securely held in CloudConnect. By only transmitting data, you get superfast usage of TaxCalc with complete peace of mind.

- Work anywhere there's an internet connection
- Gain added peace of mind with automatic data backups
- Enjoy monthly payments when purchasing CloudConnect as part of your software
- Pay just £26 a month for up to five users accessing CloudConnect simultaneously

A full list of features, versions and prices can be found at www.taxcalc.com/cloud

Practice Management

The game just changed

Introducing practice management, reinvented.

Take control with our re-engineered and enhanced practice management toolkit, comprising Practice Manager, Practice Manager Plus, and Time.

Client Hub, renamed Practice Manager, remains the administrative powerhouse of your practice, creating efficiency across the board. Practice Manager is now complemented by Practice Manager Plus, which will offer sophisticated workflow tools, along with new dashboards and widgets for a pinpointed snapshot view. Time, the other new addition to our PM toolkit, will effortlessly allow you to monitor and analyse how time is spent in your practice.

Practice Manager

Power your practice

Practice Manager can make a major difference to the way you run your firm. With its powerful administration, client information and practice management tools, Practice Manager will soon become the heartbeat of your practice. Included as standard with any TaxCalc product.

Welcome to Practice Manager,* the enhanced and renamed version of our trusted and popular Client Hub

* Included free of charge with the purchase of any TaxCalc Practice product

Overview

Dashboard

- See exactly what's going on in your practice with the interactive dashboard screen

Client Records

- Record detailed information about clients or contacts: addresses, telephone numbers, key dates, tax references, relationships, fee earners – and much more
- Capture custom data through user-added fields
- Stay on top of GDPR consent management by recording clients' marketing preferences
- Get ready for Making Tax Digital by tracking individuals' trading and property businesses in their Business Record
- Tidy up your client list by archiving former clients

Tasks

- Create tasks to assign work to be done in your practice
- Use work statuses to keep track of assignments in progress
- Get notifications as deadlines approach

Mail Merge and Tax Questionnaire

- Use Mail Merge to design and send letters and emails to your clients (requires Microsoft Word and Outlook)
- Make use of free templates for engagements, terms of business, presentation of accounts, computations and more
- Use tax return data to send a Tax Questionnaire, including the covering letter

Reports

- Produce detailed, interactive reports that use data mining to select and report upon specific clients
- Export reports to Microsoft Word, Excel and PDF formats

More

- Set up multiple user accounts, with privileges and passwords to prevent unauthorised access
- Fill out HMRC forms such as the 64-8 (both online and paper versions), SA1 and FBI-2, all prepopulated with data held in the database

Modules for added functionality

Companies House Advanced Integration

Quickly onboard new Limited Company clients, manage client relationships and be sure your clients' data is accurate and up to date.

A full list of features can be found at www.taxcalc.com/practicemanagement

Did you know?

- You can use Practice Manager to manage your new client onboarding process and keep a memo of the services and fees you've agreed in advance
- Practice Manager makes extensive use of Companies House APIs to set up new limited company clients from public data
- Phone buzzed but you don't know who rang? Pop the number that called you into our search field and see if it's a client
- If you use subcontractors or outsourcers, you can restrict software privileges and even limit views, access and reports to specific clients

Practice Manager Plus

Total control

The integrated practice management solution everyone's been waiting for

Now you can coordinate workflow delivered through TaxCalc's product suite. Practice Manager Plus gives you the functionality of sophisticated PM systems at an affordable price.

Advanced Workflow

- Create jobs (such as completing tax returns) and break them down into a series of tasks (such as sending out engagement letters), to complete work in your practice
- Set task start or due dates based on statutory deadlines
- Set reminders for when jobs and tasks can be started or if their due date approaches
- Automate steps using event triggers to progress your jobs or tasks (event triggers can be tied to actions you perform in the application)
- Set default job templates for services offered by your practice
- Always be aware of what task is holding up any job

Client Record Updates

- View a client's active jobs and / or tasks from within the Client Record
- Apply job templates to services rendered for a client
- Job Scheduler allows you to easily start recurring jobs, following standard workflows

Multiple Dashboards

- Create multiple dashboards with different sets of widgets to see a quick overview of different areas of your practice
- Create and share dashboards that you've created with other users or create private dashboards for personal use

A full list of features can be found at www.taxcalc.com/practicemanagement

Time

Effortless time-tracking

Time is our new tracking product that enables you to effortlessly and accurately monitor, record and report time activities across your practice

Auto timetracker

- Integrate time tracking into your work, whatever task you're working on. If you're flicking between several tasks, it's still easy to track time spent on each

Time logs

- Enter time efficiently
- Log time against specific clients, specific items of work, holidays, billable and non-billable hours to obtain customised, granular breakdowns
- Invoice accurately; track budgeted fees versus costs; compare productivity of staff members
- View other users' time logs (with appropriate permissions) to gain snapshots of time spent and assess performance

Approvals

- Set up a hierarchy for timesheet approvals
- View the history of timesheet submission and approval

Time reports

- Produce time specific reports
- Get a breakdown of all time logs per day by: client / billable / non-billable

A full list of features can be found at www.taxcalc.com/time

Did you know?

- You can set a firm-level charge-out rate or different charge-out rates for different users in your team
- You can specify fee basis and fees for different services for certain client types and certain business types

Communication Management

Client collaboration delivered

Communication with your clients has never been easier.

TaxCalc makes it easier and faster for you to communicate with your clients and for them to respond to you. Our esigning tool, eSign Centre, offers speed and security for faster approval and a quicker turnaround of accounts, tax returns, VAT returns and more. Look out for more communication management tools coming very soon.

eSign Centre

Prepare. Send. Monitor. Complete.

Tired of waiting for clients to approve documents? Spending time printing, signing, scanning and emailing them back?

Reduce those lead times with eSign Centre's electronic document signing service

Overview

Preparing eSign envelopes to send to clients is easy with SimpleStep to guide you through the process:

- Send envelopes to one or more recipients containing:
  - Tax Returns
  - Accounts
  - VAT Returns
  - HMRC Forms such as 64-8, SA1 and FBI-2
- Select from a list of pre-populated recipients using information from Relationships in the Client Record. Recipient not listed in the Client Record? No problem, you can add them to the Client Record without needing to leave the envelope
- Customise eSign envelope settings to set whether a recipient is to sign the document or is copied in as a watcher
- Receive approval in minutes

Envelope History Report

- Track the steps leading up to a document being signed
- View all signing parties involved in the envelope
- See the exact date and time a document was signed

A full list of features can be found at www.taxcalc.com/esign

Did you know?

- You can attach documents to an eSign envelope directly from the area of the application you use to create the document, without even opening eSign Centre
- You can set recurring reminders to send email reminders to envelope recipients
- In Admin Centre, you can set up a custom "Thank You" web address for your clients to be redirected to after successfully signing an envelope

Practice Compliance

Two centres of excellence
to keep you compliant

AML Centre and GDPR Centre

With the National Crime Agency and the Information Commissioner's Office continuing to tighten down on fraudulent behaviour and data protection infringements, the last thing you want is for your practice to be in the spotlight for non-compliance. Our practice compliance products, AML Centre and GDPR Centre, are designed to help you adopt best practice and demonstrate your compliance to published recommendations and regulations.

AML Centre

Demonstrate compliance.
Know your clients.

AML Centre helps accountants, bookkeepers and other finance professionals meet their obligations under the Money Laundering Regulations, which apply to their clients and their Firm

Overview

Firm-Wide Compliance

- Set up details of your Money Laundering Reporting Officer (MLRO)/Money Laundering Compliance Principal (MLCP)
- Design and complete your firm-wide AML risk assessment as required under MLR17
- Record risk mitigation factors and residual risks
- Identify non-compliant clients and bring their due diligence up to date via Status Management
- Link to your firm's money laundering policies and procedures
- Track MLRO/MLCP and staff training to ensure their AML obligations are up to date regarding their awareness of money laundering
- Keep a record of your beneficial owners, officers and managers, and their regulatory body's approval

Client Due Diligence

- Identify and verify your client and document Know Your Client (KYC) information required for both Standard and Enhanced Due Diligence
- Build a record of your client relationships and corporate structures
- Design and complete your client Risk Assessments on a periodic basis
- Report any suspicious activity to the MLRO/MLCP by creating an internal SAR for reporting to the NCA
- Complements TaxCalc's AML Identity Checking Service (details overleaf)

A full list of features can be found at www.taxcalc.com/amlcentre

Did you know?

- Client records can be held within AML Centre until a client's checks are successful, without needing to be synced to Practice Manager (Client Hub)

AML Identity Checking Service

Check before you act

Money Laundering Regulations state you need to be sure of your clients' identities before you act for them. Our identity checking solution can support your AML obligations*.
Run in partnership with the identity and credit checking service, Equifax, it compares any information provided by clients to corroborate their authenticity

* We advise that you consult with your regulatory body as to what level of reliance you can place on this service for your specific AML needs

Overview

- Simply enter the name, address and other information about your prospective client into the system as part of your engagement process. All known data about your client will then pass securely and electronically to Equifax for instant processing
- After carrying out the identity check, the system will return to you a PASS or REFER result with additional information about which data sources were used and the results of those personal checks

A full list of features can be found at www.taxcalc.com/aml

Did you know?

- Search credits are available on a pay-as-you-go basis – choose from our selection of bundles

GDPR Centre

The unique data compliance solution for accountants

No firm can risk the heavy fines for non-compliance with the new ICO-issued GDPR guidelines. Fortunately, you won't have to. TaxCalc's GDPR Centre module will help you manage and demonstrate your firm's compliance under GDPR and stay in control, now and always

"We're all going to have to change how we think about data protection… On a basic level, your jobs involve handling personal data – payroll info, employee details, people's expenditures. It's your responsibility to keep that information secure and ensure that individuals' rights are respected, with the risk of enforcement action and damaging publicity for your company if you get that wrong"

Elizabeth Denham, Information Commissioner, on GDPR at an ICAEW lecture, 17 January 2017

Overview

Working in harmony with the GDPR consent management and contact administration features in TaxCalc Practice Manager (Client Hub), you can use GDPR Centre to:

- Log the appointment, training and actions of your nominated Data Protection Officer
- Carry out annual reviews of your internal data processes
- Record what kind of personal data you hold (and why)
- Track and file Data Subject Access Requests
- Create scenarios to test how your firm will react to a variety of situations
- Register data breaches - and help prevent them happening again
- Record any international data organisations you work with

And much, much more – all complying strictly to the ICO's recommendations.

As you'd expect, GDPR Centre works beautifully with all of our products. Nothing difficult or technical. Just simple steps you can take to start as you mean to go on.

A full list of features can be found at www.taxcalc.com/gdprcentre

Did you know?

- You can send clients' tax returns, sets of accounts and VAT returns securely with PDF Encryption – see price list on the back page
- You can use other tools within TaxCalc, including consent management, to stay on top of GDPR. See our Practice Manager pages for more information

Compliance Services

The science behind compliance

The tools of your trade

All working together, sharing data between applications to make you more productive in practice. Choose from Accounts Production, Tax Return Production, MTD-enabled VAT Filer and Company Secretarial products, working either standalone or in perfect harmony.

Accounts Production

Effortlessly produces financial statements and supporting schedules

"TaxCalc Accounts Production is such a treat to use"

Integrations with:

TaxCalc Accounts Production caters for Sole Trader, Partnership, LLP and Limited Companies, and is ideal for clients with turnovers of less than £10m

Overview

- Create posting batches easily
- Integrate with online accounting software packages: QuickBooks Online, Xero and FreeAgent
- Import data from most bookkeeping packages via CSV
- Intuitively use notes and disclosures
- Produce:
  - Financial statements
  - Lead schedules
  - Single or multi-year trial balances with variance analysis
  - Nominal ledger
  - Audit trail
  - Tax report
- Drill down to postings directly from an audit trail, nominal ledger and trial balance
- Customise reports
- Edit onscreen accounts
- Use Check & Finish to validate accounts prior to filing
- Create Limited Company and LLP accounts in iXBRL format with no manual intervention
- Submit online to Companies House and monitor progress
- Integrate seamlessly with TaxCalc Tax Return Production

Supports

- Sole trader:
  - Full accounts
  - Income and expenditure statement
- Partnership:
  - Full accounts
  - Income and expenditure statement
- Limited Liability Partnership (LLP):
  - FRS 102 section 1A for small companies (inc SORP)
  - FRS 105 for micro-LLPs
  - Full and Registrar (filleted) accounts
  - Abridged accounts
  - Old UK GAAP (FRSSE 2008, 2015, SORP 2015)
  - Abbreviated accounts (old UK GAAP only)
  - Audited and unaudited accounts
  - Dormant accounts
- Limited Company:
  - FRS 102 section 1a for small companies
  - FRS 105 for micro-entities
  - Full and Registrar (filleted) accounts
  - Abridged accounts
  - Old UK GAAP (FRSSE 2008, 2015, micro format)
  - Abbreviated accounts (old UK GAAP only)
  - Audited and unaudited accounts
  - Dormant accounts
  - Companies limited by guarantee

Did you know?

- Smart filters are provided in the Edit Notes window to quickly identify disclosures required by law and those encouraged by FRS
- You can customise template notes, charts of accounts and the labels used in presenting them on both system and client levels
- Our Check & Finish feature uses a traffic light system to identify critical errors, warnings and information-only messages
- iXBRL accounts can be attached to the tax return directly from within Accounts Production
- Our Template Batch feature allows you to use last year's posting codes to populate next year's trial balance

A full list of features can be found at www.taxcalc.com/accountsproduction

Modules for added functionality

PDF Encryption*

- Password protect sets of accounts for emailing to your clients

*PDF Encryption is only supported on Windows systems

Tax Return Production

Makes light work of clients' tax returns

"The best tax return software you can use. As an agent, I would recommend it to everyone who needs to submit a tax return"

Using unique intelligent functionality, TaxCalc Tax Return Production enables you to prepare Individual, Partnership, Corporation and Trust Tax Returns with ease

Overview

- Utilise a set of powerful tools:
  - SimpleStep guides you every step of the way
  - Check & Finish feature validates entries prior to filing
  - Wizards and worksheets improve productivity
- Self-Assessment:
  - Capital allowances
  - Self-employment basis period calculation
  - Company car and van
  - Residence and domicile
  - Pension contributions annual allowance
- Corporation Tax
  - Capital allowances
  - Research & Development Tax Credit
  - Loans to Participators
  - Patent Box relief
- Use data directly from TaxCalc Accounts Production
- Download tax data directly from clients' HMRC Personal Tax Accounts
- See client tax liability displayed on screen in real time
- Use tax return data to update Practice Manager (Client Hub) in preparation for Making Tax Digital
- All supplementary pages provided

Supports

- SA100 Individual Tax Returns
- SA800 Partnership Tax Returns
- CT600 Corporation Tax Returns
- SA900 Trust Tax Returns

Modules for added functionality

VAT Filer

Quickly and efficiently files VAT returns and EC sales lists using both the government gateway and MTD services.

Dividend Database

Supplies FTSE350 and AIM-listed dividend data in an instant. Select the shareholding from the list and enter the number of shares. The database will do the rest.

What If? Planner

Uses previous tax return data to project tax liabilities for the current tax year. Creates and forecasts tax scenarios.

HMRC Forms

Contains useful HMRC forms to print or file online, including:

- SA1 – Registering for Self Assessment
- FBI-2 – Authorise an agent to use PAYE/CIS online services
- 64-8 – Authorise an agent
- VAT1 – Application for registration
- VAT7 – Application to cancel your VAT registration

Batch Filer

- Aggregates and queues up all approved tax returns for bulk filing. Works whether you have detailed review and filing processes or simply have many tax returns to process

Did you know?

- You can create a relevant posting journal for Corporation Tax liability directly to Accounts Production to finalise the financial statements
- TaxCalc will warn you when there are differences between fixed asset additions in Accounts Production and Corporation Tax
- iXBRL tagging of the Corporation Tax computation is automatically done for you
- You can use the Basis Period Calculation Wizard to make the correct adjustment to trade profits and produce a record of overlap relief

A full list of features can be found at www.taxcalc.com/tax

Modules for added functionality

PDF Encryption

- You can send clients' tax returns securely with PDF Encryption

*PDF Encryption is only supported on Windows systems

Making Tax Digital

We're with you all the way

We're totally committed to supporting you on your Making Tax Digital journey, preparing you for the changes ahead. Trust us to do the hard work, so you don't have to.

MTD

MTD-ready TaxCalc solutions already in place

TaxCalc VAT Filer

TaxCalc VAT Filer lets you view and submit VAT return data using HMRC's MTD for VAT service and comes with many other smart features, such as the facility to import digital records from spreadsheets and other sources. VAT Filer supports dual services, so you can continue to file using the Government Gateway, then make use of seamless integration to MTD when the time arises.

Business Creation Wizard in Client Hub (Practice Manager)

We've enhanced Client Hub, now known as Practice Manager, so you can now create multiple businesses (Trades, Property, Foreign Property) for your clients with separate VAT and PAYE information. The Business Creation Wizard lets you segregate data and define separate businesses within the same client. It's perfect for clients with multiple sources of income and makes reporting on multiple businesses with different year ends easier to manage.

Self Assessment Pre-Population APIs

HMRC released a set of application programming interfaces (APIs), enabling taxpayers and authorised agents to access HMRC data via third party software for pre-populating SA100s. With TaxCalc Tax Return Production, this task couldn't be easier. All you have to do is select 'Fetch' and the software will request the information and pull it into the SA100 for you.

MTD Business Wizard

TaxCalc's MTD Business Wizard in Tax Return Production provides the facility to identify and manage clients who will need to subscribe to MTD. Guiding you every step of the way, the MTD Business Wizard lets you create and update the business record in Client Hub (Practice Manager) with information from a client's tax return.

To find out more, visit www.taxcalc.com/mtd

VAT Filer

The efficient way to file VAT returns online. Now MTD compliant.

Simplicity and flexibility with the future built-in

Overview

TaxCalc VAT Filer bridges the gap between your clients' digital records and VAT returns for submission to HMRC's MTD for VAT service:

- Quickly and easily import VAT data from spreadsheets via a digital link (including those exported from third party software)
- File through both the Government Gateway and MTD for VAT services
- Store all your VAT data in one place, including source data, adjustments and supporting documentation
- Add attachments to VAT returns for reference purposes

A full list of features can be found at www.taxcalc.com/vat

"I have just purchased VAT Filer and cannot believe how easy it is. Thank you so much for saving me all the worry and pressure of installing a full blown accountancy package before we were ready"

Sara Riley, Plandescil Ltd

MTD Ready

Did you know?

- You can obtain speedy client approval using eSign Centre
- A snapshot of the spreadsheet used for the import of VAT data can be retained against your VAT return for ease of reference
- If you don't offer VAT services as an agent, VAT Filer can also be used by businesses to complete and file their VAT returns

Company Incorporator

The simplest way to perform Company Incorporations and file Companies House Forms

Overview

Incorporate Private Limited Companies and Limited Liability Partnerships (LLPs) with speed and efficiency. By carrying out the incorporation within TaxCalc, you'll avoid costly time spent retyping and setting up the new company. And once your client's been incorporated, their data will be updated automatically in Practice Manager (Client Hub).

- Move swiftly through the incorporation process, guided by SimpleStep
- Validate your incorporation prior to filing with Check & Finish error-checking
- Submit online to Companies House and monitor progress
- Store and access Incorporation Certificates

Supports

- Private Limited Companies by Shares
- Private Limited Companies by Guarantee
- Limited Liability Partnerships

A full list of features can be found at www.taxcalc.com/companyincorporator

Companies House Forms

Save time keeping Companies House up to date by filing company forms securely online

Overview

Features a library of the most commonly used forms, including managing officers and shareholders, and the Confirmation Statement.

- Create forms quickly, guided by SimpleStep
- Validate each form prior to filing with Check & Finish error-checking
- Submit online to Companies House and monitor progress
- Update your Client Record within Practice Manager (Client Hub) and the relevant form to file at Companies House automatically activates

Or

- Create a form from scratch and manually enter information

A full list of features can be found at www.taxcalc.com/companieshouseforms

Did you know?

- Companies House Advanced Integration is included with Companies Forms Unlimited as standard, allowing quick and easy access to company information and relationships – the ability to sync directly into Practice Manager (Client Hub)

Support.
Here to help.

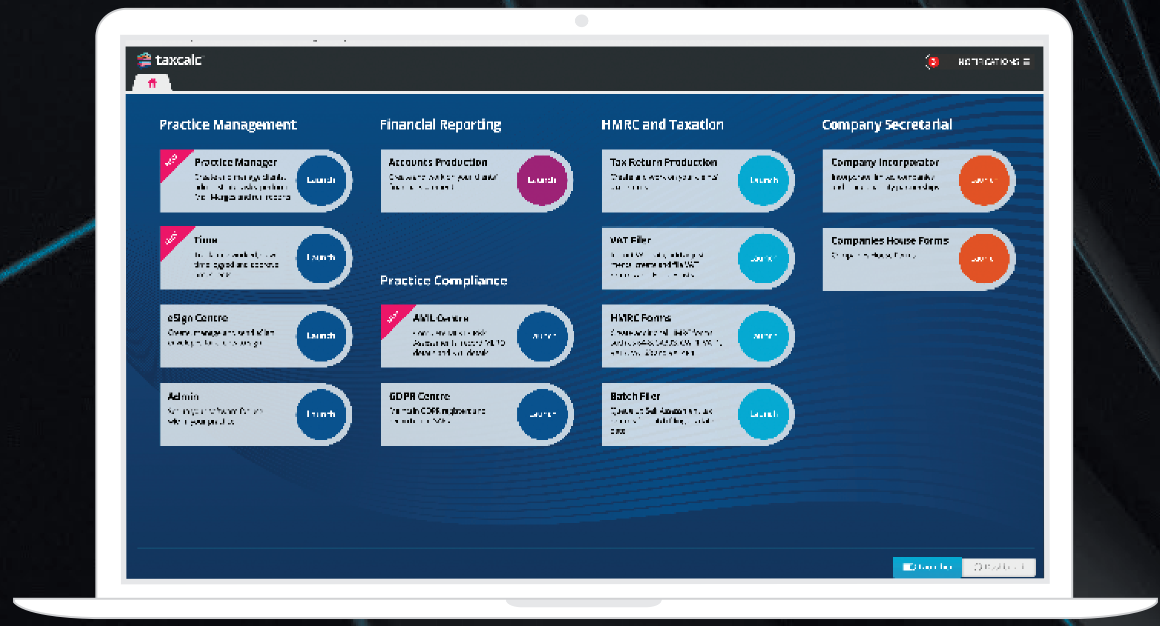
The goodness in TaxCalc goes way beyond our software. Our product support team will take care of any queries you have and go the extra mile to find the answers you need. We aim to answer all emails within one working day, and calls within 60 seconds.
As well as email and phone Support, you can access our extensive online Knowledge Base, watch video tutorials and find tips in our software applications.

“ I’ve used TaxCalc for many years and have always found the Support team to be superb”

“ I can’t fault the Support team, they’ve always resolved my issues. They’re just so friendly, courteous and helpful”

“ It’s just so easy to use and brilliant Support on the rare occasions I’ve had questions”

“A great product and ideal for my practice. Outstanding Support from the back office too”



Precision engineered pixels

When we engineer our software, the first and last thing we think about is you. With you in mind, we work hard to make the experience effortless and intuitive. Everything you see on screen is there for a reason, researched and roadtested by customers. The interface, based on the TaxCalc Neue Design System, is purposefully simple, logical and consistent across all products. So once you’ve mastered one TaxCalc product, you’ve pretty much mastered them all.

You could say we obsess over the pixels. The result is a user experience you won’t find elsewhere.

No wonder people love TaxCalc.

Moving to TaxCalc

Don't put up with your current expensive, clunky software just because you think it'll be a hassle. Migrating your clients to TaxCalc couldn't be simpler. You have two options:

1. The let-us-handle-it approach

For a fee, we can handle the technical stuff and perform the migration for you. Here's how:

- We'll ask you to send us a copy of your main database file (such as an SQL backup)
- Then we'll export your data and manipulate it into our import layout
- We'll review your data and then test it with you to make sure it's all in order
- Finally we'll perform an import into your database

2. The DIY approach

Using the Client Import tool within our software, you can bring client details over yourself.

Like everything within TaxCalc, it's an easy-to-follow, step-by-step process. If you need a little extra help, our Support team will be on hand to talk you through the finer points.

Call Support on 0345 5190 882
Email support@taxcalc.com

Client information you can bring over includes:

- Client type
- Names
- Addresses
- UTRs
- NI numbers
- CRNs
- And more

- All data is transferred to and from your site securely. As you'd expect, we'll delete any data worked on as part of the conversion process when no longer required
- With some databases, we can also export out your trial balances and produce an import map so you can quickly bring them into TaxCalc Accounts Production

- Databases we can migrate data from include:
  - IRIS
  - Keytime
  - PTP
  - CCH
  - Digita
  - BTC
  - Taxfiler
  - And more, including proprietary and bespoke packages

Please speak with us regarding your data migration and training needs.

taxcalc®

Price List

Practice Management & Practice Compliance

	Price Per annum (ex. VAT)
Practice Manager	Included when you purchase any TaxCalc product
Practice Manager Plus *	From £40 per user
Time *	From £20 per user
eSign Centre (10 to 250 envelopes)	From 90p per envelope
AML Centre *	From £80 for 24 clients
AML Identity Checking Service	See taxcalc.com/aml for versions and prices
GDPR Centre	£125

Financial Reporting

Accounts Production

	Clients	Sole Traders	Partnerships	LLPs	Ltd Companies	
Unlimited	Unlimited	✓	✓	✓	✓	£545
Small Practice	50	✓	✓	✓	✓	£277
Micro Practice	12	✓	✓	✓	✓	£122
Additional concurrent users						£110 per user

HMRC & Taxation

Tax Return Production

	SA100 Individual clients	SA800 Partnership clients	SA900 Trust clients	CT600 Company clients	
Individual and Partnership Unlimited	Unlimited	Unlimited	✗	✗	£350
Corporation Tax Unlimited	✗	✗	✗	Unlimited	£260
Corporation Tax 50	✗	✗	✗	50	£225
Corporation Tax 12	✗	✗	✗	12	£180
Individual 12	12	✗	✗	✗	£134
Micro Practice	12	5	✗	5	£270
Trust Unlimited	✗	✗	Unlimited	✗	£185
Additional concurrent users					£110 per user

VAT Filer MTD Ready

Unlimited	Unlimited	£200
Small Practice	50	£150
Micro Practice	12	£75
Additional concurrent users		£110 per user

Company Secretarial

Company Incorporator

10 assisted incorporations	£80
20 assisted incorporations	£140
50 assisted incorporations	£300
100 assisted incorporations	£500

Companies House Forms

Unlimited	Unlimited	£260
Small Practice	50	£180
Micro Practice	12	£80

TaxCalc CloudConnect®

From £26 per month

Consultancy Services

(Installation, data migration and training)

Please ask us for prices

For more information, visit taxcalc.com or call our Sales team on 0345 5190 883

* Coming soon