

Supporting your MTD for Income Tax cycle

1 Identify affected clients

- Sole traders and landlords
- > £50k turnover from April 2026
- > £30k turnover from April 2027
- > £20k turnover from April 2028

 **TaxCalc Practice Manager**
(Report Manager)

2 Select the most appropriate digital record keeping solution

- ✓ Spreadsheets
- ✓ Bookkeeping software
- ✗ Manual cashbook

 **TaxCalc Spreadsheet Templates & Bookkeeping Connect**

3 Track MTD reporting periods

Tax quarters

Jul 5, Oct 5, Jan 5, Apr 5

OR

Calendar quarters

Jun 30, Sep 30, Dec 31, Mar 31

 **TaxCalc WorkFlow**

4 Request information

Transactional update

NOT

Management accounts

 **TaxCalc Communications Centre**

5

5 File quarterly updates

1 month filing deadline

 **TaxCalc MTD Quarterly Filer**

6

6 Prepare and file end of year tax return

31st January filing deadline

 **TaxCalc Tax Return Production**

7

7 Obtain client approval digitally

Client approves final declaration to submit tax return

 **TaxCalc eSign Centre**

8

8 Document entire process

Stored securely in the cloud for easy access and retrieval

 **TaxCalc Document Manager**