



## gold service plan

**Prepare your statutory financial statements.**

**Prepare abbreviated financial statements & submit to Companies House.**

**All business tax matters, including preparing corporation tax computations & preparing and submitting Corporation Tax Self-Assessment returns.**

**Self-Assessment:** We shall prepare and submit YOUR personal tax return.

**Deal with all correspondence from HMRC.**

**Annual return:** Prepare and submit the annual return.

**Payroll:** Monthly payroll for up to 3 employees

**Cashflow statement:** Produced Quarterly. A traditional set of accounts does not necessarily highlight how the cash has been received/spent during the year. This statement drills down to show exactly where your money has gone!

**Benchmarking report:** This will clearly show you just how well you're doing against your competitors, measured against key performance indicators such as:

- profits
- sales growth
- productivity

**Goal setting:** Not only does identifying your goals and putting them to paper give you a clearer focus it also gives you a better chance of achieving them. The well-known Harvard study showed that the 3% of graduates with clear written goals earned more than 10 times the remaining 97% combined! Our sessions will highlight your business goals as well creating an action plan to achieve them. "A goal without a plan is just a dream"!

**Business tax planning:** A detailed tax planning review before your accounting year-end so you are aware of opportunities to minimise tax liabilities. This enables us to proactively plan your wealth creation strategies using your retained after tax profits.

**Company car planning:** Each time you are buying a new vehicle we ensure you are aware of the most appropriate method of finance & minimisation of tax liabilities.

**VAT health check:** We will review your VAT records to ensure that you are complying with the VAT requirements. This will minimise the risk of penalties and interest from any subsequent visit from HMRC.

**Report on the Accounting Systems:** Our accounting systems grading report will help you to improve your systems and thereby reduce your accountancy fees.

**Quarterly spotlight reports:** Quarterly management reports that give all company shareholders/directors the assurance how the business is performing in an easy to understand format.

**Spotlight sessions:** Quarterly spotlight meetings with all directors/shareholders throughout the year to highlight and discuss what really matters. This will include a review of the previous period's results as well as setting Key Performance Indicators for the following period. If applied correctly, this is guaranteed to help promote business growth.

To ensure complete transparency this Fixed Price Agreement defines the services **yourFD** will perform for you. Fixed fees are calculated on the basis that your accounting systems produce excellent quality computerised system records. The Fixed Fee costs above show your investment in our services plus VAT per month, Fixed Fees are payable in monthly instalments by standing order.

**REMEMBER, as part of this fixed fee, yourFD are also providing YOUR COMPANY with unlimited access to the entire yourFD team for advice on ad-hoc matters.**

**This means that YOUR COMPANY can call on us at any time knowing that (subject to the notes below) they will not be charged for the time or advice.**

### **Unanticipated Services**

If the issues raised at any of the unlimited consultations described in the previous paragraph require research and analysis beyond the consultation, **yourFD** will provide a fixed price quotation before any additional work is done.

**Only if YOUR COMPANY signs an “Extra Work Order” (EWO) to confirm that they are happy to pay for the extra work – on the mutually acceptable terms described in the EWO – will yourFD carry out any work over and above that specifically listed in this agreement.**

### **Guarantees & Safeguards**

To make sure that our arrangement continues to be fair to both parties, we will meet throughout the year and, if necessary, change the scope of the services to be provided and the prices to be charged in light of mutual experience.

In addition, either party may terminate the Agreement at any time, for any reason, by giving 10 days written notice. Any services that have not been paid for at that time will then be settled in full within 10 days.