

# Schedule of Services

## Fees

SJD Essential Package £120 + VAT

SJD Essential Pro Package £135 + VAT

SJD Premium Package £180 + VAT

SJD Elite Package £225 + VAT

Fees are payable in accordance with the Terms of Business. We require a minimum of 12 monthly fees to be paid within an accounting period in order to prepare the Annual Accounts and Corporation Tax Return for that accounting period. However, if the company year is extended beyond 12 months then additional monthly fees would be due for the additional months in the company accounts. Please refer to the fee list if you require additional services.

Your monthly fee encompasses the following “Included Services” (except where stated otherwise), which you or your company may utilise within a given contract period:

## Advice & Support

Tax planning meeting via telephone or face to face meetings and a 9-month review.

Unlimited telephone & email support, subject to our normal hours of business from 9am to 5pm five days per week also excluding bank holidays.

Face to face meetings at one of our local offices.

Access to our Online Portal to manage your accounts.

## Prearranged Set Up

Form a limited company at Companies House (Included in the Premium and Elite Packages only. An additional fee will be payable if you are on the Essential Package.)

Register for Corporation Tax.

Assist with opening a bank account with Metro Bank.

## **Payroll**

Completion of PAYE registration forms.

IR35 deemed salary calculations if applicable.

Preparation of Payroll records for up to 2 employees.

Monthly RTI submissions and End of Tax Year RTI submission for up to 2 employees.

Calculation of PAYE payments and filing of any relevant returns with HMRC.

Reminders for NI/PAYE liabilities.

Sending monthly payslips via email and inputting these payslips into your Online Portal.

Review (and adjustment if required) of PAYE Tax Coding Notices for employees.

Issue of P60 for each employee.

Setting up new starters on payroll and issuing P45's for leavers.

Completion and submission of P11d & P11d(b) with HMRC.

Calculation on Class 1A NIC payments where applicable.

Excluded is the submission of any returns where references and filing authorisation have not been supplied.

## **VAT**

Completion of VAT Registration forms, including Flat Rate Scheme where applicable.

Calculation & advice of VAT payments where applicable.

Submission of VAT Returns with HMRC where applicable.

Assistance with any VAT queries from HMRC, where our advice has been followed.

Excluded is the submission of any returns where the VAT registration number and authorisation code have not been supplied.

Excluded is the preparation of returns when SJD have not been provided with all requested information.

## **Annual Accounts**

Preparation of annual accounts, CT600 and calculation of Corporation Tax liability.

Submission of annual accounts to HMRC and Companies House.

Submission of CT600 with HMRC.

Excluded is the submission of Accounts or CT600's, where written approval of these documents has not been received.

Excluded is the submission of any returns where the Corporation Tax reference and filing authorisation have not been supplied.

Excluded is the preparation of accounts or CT600 returns where SJD have not been provided with all requested information.

Providing we have received all the information requested, annual accounts will be prepared within 4 weeks of receiving the information

## **Personal Tax Returns**

The completion of Self-Assessment Tax Returns for one director subject to information being received by the 30<sup>th</sup> September of the preceding tax year. We may, at our discretion, charge additional fees for this service and for additional pages as outlined in the schedule of fees for specific pages.

Additional fees will be payable where you ask us to complete a Self-Assessment Tax Return for any additional directors/spouses/shareholders.

## **Dealing with Third Parties on your behalf**

Preparation and submission of the Companies House Confirmation Statement (excludes filing fee).

Deal with any general HMRC and Companies House correspondence and queries.

Deal with address changes for the company and directors with HMRC and Companies House.

Assist with Office of National Statistics questionnaires.

Advice relating to HMRC enquires, we can also deal with these at our offices, subject to HMRC's approval. Note, for investigations, an hourly rate may apply.

Employment references (confirming dates of employment).

## **In addition, the SJD Essential Pro, Premium and Elite Packages includes the following:**

### **Essential Pro, Premium & Elite:**

Company Formation with Companies House.

\*Business Insurance Package (£5m Professional Indemnity, £10m Employers Liability, £5m Public Liability).

*\*Certain limitations apply dependent on trade activities/sectors. Please speak to your accountant or onboarding co-ordinator to confirm further details.*

### **Premium & Elite:**

Using our address as the company's Registered Office and Service office address.

Access to SJD Rewards Benefits Package.

Bookkeeping service (for up to 50 transactions per month).

### **Elite:**

Bespoke IPSE Package.

IR35 Reviews.

## **Non-Trading Service**

We also offer a non-trading package with a reduced service for a reduced fee. However, these fees are only applicable if the company has not traded in the entire accounting period. If the company was to trade within the accounting period, then the full fees would be applicable for that accounting period.

## **Customer Promise**

At SJD Accountancy we pride ourselves on our customer service and the details of this can be found on our website at: <https://www.sjdaccountancy.com/about-us/customer-promise>. We reserve the right to amend this promise without prior notification.

## **Excluded Services**

Dealing with HMRC enquires regarding periods and work when we did not act for you, in instances where you have gone against our advice or following the utilisation of tax avoidance schemes.

Provision of the "Included Services" for multiple directors and/or additional fee earners working through the company.

The completion of Self-Assessment Tax Returns for additional directors, or related parties (not applicable if paying the additional fee earner fee for the director/party in question).

Mortgage, Tenancy and Visa References.

Provision of Registered Office service.

IR35 reviews (Essential, Essential Pro & Premium)

Company closure and provision of pre-liquidation accounts.

Liquidation accounts and disbursements.

Payroll for additional (over 2) employees.

Expediency accounts (for any accounts needed to be turned around in a short period).

Hourly specialist work.

Company restorations.

Advice & tax planning only includes in relation to the included services and does not include: property purchases, investments held in the company, disposals, inheritance, trusts, audit, sale of assets, foreign investments, dual residency and regulated advice such as financial planning which is regulated by the FCA.

These excluded services will be charged at our current rates as published on our website at: [http://sidaccountancy.com/terms\\_and\\_conditions/additional\\_fees.html](http://sidaccountancy.com/terms_and_conditions/additional_fees.html). We may from time to time waive these fees depending on the exact nature of the work. In addition, we reserve the right to change these fees without prior notification.