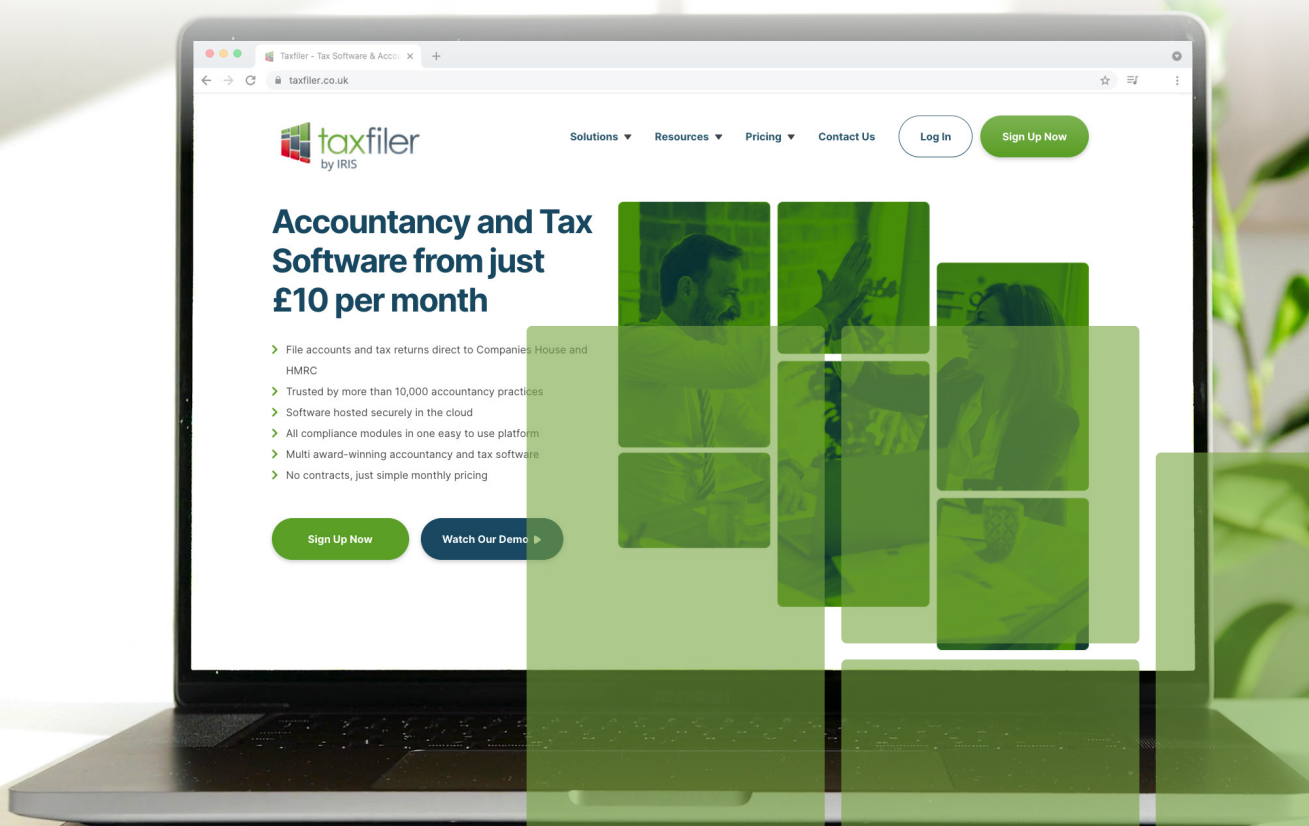




Award-winning accountancy
and tax software,
designed for accountants and built in the cloud



taxfiler.co.uk



“Taxfiler has changed the face of our firm for the better. Moving towards paperless and a cloud-based practice it perfectly fits our needs. The software is effortless, effective and beautifully simple and has truly made our job as accountants easier. The fantastic user interface is fast and efficient this allows for a much quicker workflow. Email support is met with a genuine personalised response from one of the team who are extremely knowledgeable about the software. The last 18 months since changing to Taxfiler has been absolutely phenomenal!”

-Jim Borrill, D.H.Tuck & Co.

A track record for being trusted

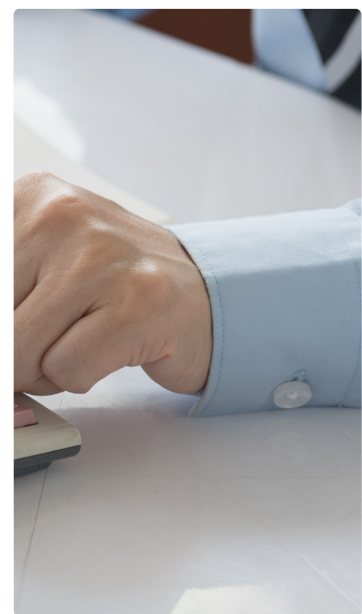
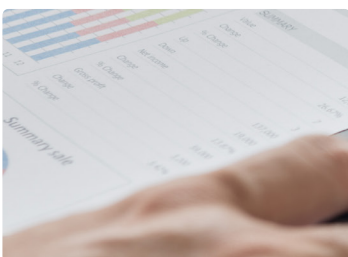
Did you know 10,000 practices now trust Taxfiler to prepare and file their statutory accounts and tax returns to Companies House and HMRC?

The reason is that our award-winning cloud suite delivers complete compliance, for any size of practice, that is flexible and affordable. Our customers love the fact that it is an easy to use online platform that works on all modern web browsers.

Taxfiler has a simple, transparent monthly pricing policy that allows filing for companies, partnerships, individuals and trusts. Moreover, all compliance modules are included in every pricing plan.

Our software delivers everything needed to run a successful practice:

- Accounts preparation
- Corporation tax
- MTD for VAT
- Deadline diary
- Self assessment
- Partnerships
- Trusts & Estates
- User access rights (multi-user version)



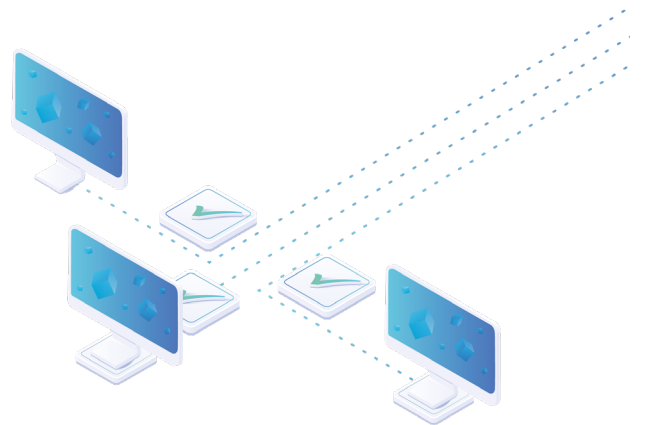
Compliance to keep you up to speed

Taxfiler is continually updated in line with current legislation to ensure you are up to speed with compliance.

Whatever you need tomorrow, Taxfiler will have it ready for you and, as the needs of your practice change, you will have the tools to stay ahead.

"The pioneer of cloud applications for tax."

accountingweb.co.uk



Making Tax Digital

Making Tax Digital for VAT took effect on 1 April 2019, ushering in a new era for tax reporting.

Taxfiler has a VAT filing solution that enables practices to fully comply with the new rules.

It supports you to:

- Make and complete VAT return submissions
- Retrieve obligation periods from HMRC
- Track payment history
- See outstanding liabilities
- View and retrieve previously submitted VAT returns
- Import from Kashflow, Xero, Quickbooks Online, Sage, FreeAgent, VT & Excel

Want all of these features? That's what you'll get with all Taxfiler packages, giving you complete compliance within one simple to understand licence.

You also get:

- Tax Returns
- Accounts Preparation
- Deadline diary **not available with the Startup package*

This all adds up to your compliance submissions in one online application.



“Taxfiler is brilliant. Well-designed and very affordable. I’m a relatively small practice and I like that a software company has thought “what does a small practice need in terms of functionality and price?”. The customer service is always exceptional, fast replies and queries answered first-time.”

Craig Thornton
CST Accountancy Services Ltd



Accounts Production

Taxfiler Accounts Production enables practices to produce year end annual accounts for companies, sole traders, partnerships and LLPs. It is included with every Taxfiler subscription and integrates seamlessly with the rest of the suite.

Simple input screens and intelligent formatting tools allow easy implementation of accounting standards and ensure swift preparation of well-presented statutory accounts.

“Excellent Accounting Software for a very reasonable price. I’m so impressed and glad I decided to sign up.”

Magdalena Kaczynska

Management Accountant at Civvals

Key Features:

- Quickly and easily prepare final accounts from trial balance stage
- Option to import figures from spreadsheets or bookkeeping software such as:
 - QuickBooks online
 - Xero
 - Sage
 - KashFlow
 - FreeAgent
 - VT
- Notes and disclosures are numbered and tagged automatically
- Transfer balances seamlessly from the completed accounts to the tax return
- Submit iXBRL-tagged accounts directly to Companies House at the click of a button
- Includes formats for small companies, micro-entities, sole-traders, partnerships and LLPs



Corporation Tax

The Taxfiler suite includes a comprehensive Corporation Tax solution that is suitable for any size and type of company.

Integration with Taxfiler Accounts Production ensures rapid preparation and submission of company tax returns to HMRC.

“What can we say about this superb software from Taxfiler? It's really easy to use for both tax returns and final accounts, it integrates seamlessly with QBO, it's very affordable and the fantastic customer service never ceases to impress us. There's absolutely nothing we don't like!”

Paul Simpson
Shuttertax



Key Features

- Transfer amounts directly from the final accounts to the tax return
- Long periods of account can be apportioned across multiple accounting periods
- Generate fully-tagged iXBRL computations
- Capital allowance calculation
- Research and development and 'above the line' tax credits
- All supplementary forms including Participator Loans, Group Relief and Charities
- Upload any additional PDF attachments that need to be submitted with the tax return
- Comprehensive checks to ensure each tax return will pass HMRC online validation
- Submit the tax return directly to HMRC at the click of a button



Self-assessment

Taxfiler has been designed to simplify the preparation and filing of self-assessment tax returns. Powerful tools and calculators are integrated into the software at the point they are needed, and time-saving features that you might expect to cost extra are included as standard.

The scalable architecture of Taxfiler ensures it is the perfect choice for all firms, from a sole practitioner working alone, through to large teams preparing significant numbers of tax returns.



Key Features:

- Roll-forward data year-on-year
- FT350 dividend included at no additional cost
- Reading information directly from HMRC data sources
- Instantly produce a personal questionnaire tailored for each client
- List of dividends paid by quoted UK companies to speed up data entry
- Full capital allowance calculations
- Capital gains tax computations
- Farm & literary averaging calculator
- Detailed schedules and computations
- Upload attachments
- Entries are reviewed for errors and possible mistakes before filing
- When returns are ready for client approval they are locked to avoid accidental changes
- HMRC submission receipts are stored after filing
- All supplementary forms are supported

“I have used lots of software packages over 24 years in my practice and none have been half as good as Taxfiler – for ease of use, functionality, intelligent thought-through design and value for money. If only all software was this good! Well done as always and thanks for getting it so right.”

Stephen M. Gray
Chartered Accountant

Partnerships

Taxfiler includes full support for preparing and filing partnership tax returns, using the same straightforward processes used to file for individuals.

If you have prepared partnership or LLP accounts using Taxfiler, then you can simply transfer the account figures directly into the partnership tax return to ensure the trading pages are populated correctly.

Allocating profits to partners is simple, and you can link in each partner's individual record so the data is seamlessly updated to their own personal tax return.

All the supplementary forms are available, as is the ability to handle investment partnerships, partnerships with multiple trades and partnerships with a mix of personal and corporate partners.



Trusts and estates

Select from a variety of trust types, including charitable and non-resident trusts. Entering details of trust income and allowable expenditure is quick and easy, and you can also input details of beneficiaries and any discretionary payments made.

Taxfiler will compute the tax payable by the trust, including any tax due on discretionary payments, and will also perform the necessary tax pool calculations.

Taxfiler will also generate R185 forms containing the details of trust payments, and these can be distributed to beneficiaries as required.

“It’s not often you come across a product or service these days that simply leaves you astonished by its brilliance”

John Moser
Main Objective Ltd



Deadline Diary

To help you manage staff, clients and keep track of deadlines, we've packed in some useful features:

Never miss an important filing deadline; Deadline diary helps you keep track of upcoming submissions.

Date	Status	Code	Name	Type	Description
19/08/2020	Overdue	C120620A	Demo Account	CIS	CIS return for period 06/07/2020 to 05/08/2020
31/08/2020	Overdue	150120	150120	Corporation Tax	Tax Return for accounting period 01/09/2018 to 31/08/2019
31/08/2020	Overdue	CT60067377	CT60067377	Corporation Tax	Tax Return for accounting period 01/09/2018 to 31/08/2019
19/09/2020	In Progress	C120620A	Demo Account	CIS	CIS return for period 06/08/2020 to 05/09/2020
30/09/2020	To Do	ZZWCom03	Company 03	Accounts	Company accounts for year ended 31/12/2019
30/09/2020	In Progress	WICT011	Company PWWTIF	Accounts	Company accounts for year ended 31/12/2019
30/09/2020	To Do	BAI001	Bailey and Sons Limited	Accounts	Company accounts for year ended 31/12/2019
30/09/2020	To Do	C200720	Greenholt and Sons	Accounts	Company accounts for year ended 31/12/2019
30/09/2020	To Do	C090920	Taxfiler Demo Company	Accounts	Company accounts for year ended 31/12/2019
02/10/2020	To Do	TEST1	CONTINENTAL PRODUCE LIMITED	Confirmation Statement	Confirmation statement due for review period ending 18/09/2020
19/10/2020	To Do	C120620A	Demo Account	CIS	CIS return for period 06/09/2020 to 05/10/2020
07/11/2020	To Do	C100720	Company VAQVSB	VAT	VAT return for period 01/07/2020 to 30/09/2020
19/11/2020	To Do	C120620A	Demo Account	CIS	CIS return for period 06/10/2020 to 05/11/2020
30/11/2020	To Do	WICT010	Company PWWTIF	Accounts	Company accounts for year ended 29/02/2020
30/11/2020	To Do	CTb/fvdlLoss0000000009	CTb/fvdlLoss0000000000	Accounts	Company accounts for year ended 29/02/2020
30/11/2020	To Do	C010520	C010520 Company	Accounts	Company accounts for year ended 29/02/2020

Other Features

When starting out with a new client it's important to get the details right. Taxfiler helps by grabbing company details from Companies House, which saves you the effort of re-keying too.

Reporting

Reporting is essential but can also be personal, that's why we've included the essentials as standard but included a flexible reporting tool so you can also create your own reports.

Client Approval

Quickly obtain client approval for tax returns by uploading returns to the IRIS OpenSpace client portal. Request approval and OpenSpace will notify you once this is received.

Need more than one user? No problem. Our PRO package allows you to add as many users as you need. Access rights come as standard with all multi-user versions of Taxfiler.

Multi-user versions also have the option to make certain client records private by locking them to a specific user. You can manage your own tax return safe in the knowledge that only you can see it.





Simple monthly pricing

When you sign up to Taxfiler there are no long-term contracts and no setup fees. Just choose the plan that is right for you and get started. You can upgrade your plan at any time.

STARTUP	SOLO	PRO	TEAM
£10 ^{+VAT} per month	£22 ^{+VAT} per month	£32 ^{+VAT} per month	£213 ^{+VAT} per month
No annual discount	10% discount if paid annually	10% discount if paid annually	10% discount if paid annually
10 clients	30 clients	Unlimited clients	Unlimited clients
Single user	Single user	Multi user (£32 per user/per month)	10 users (Additional users £22 per month)
Statutory Accounts Corporation Tax Self assessment MTD for VAT Bookkeeping integrations	Statutory Accounts Corporation Tax Self assessment MTD for VAT Bookkeeping integrations Deadline diary	Statutory Accounts Corporation Tax Self assessment MTD for VAT Bookkeeping integrations Deadline diary	Statutory Accounts Corporation Tax Self assessment MTD for VAT Bookkeeping integrations Deadline diary
For startup practices	For sole practitioners	Single or multi user	Multi user

Try the demo available on our website
taxfiler.co.uk



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