

What's included in our tax return services?

This document explains what's included in our tax return services, along with details on any areas that may fall outside the usual scope. If you need support with something beyond your tax return, we'll happily guide you towards the best next step. From there, you can decide whether to add an extra service or simply continue without it, and of course, you may be eligible for a refund if you choose not to proceed.

Tax Return Services

Tier comparison

	Tax Return Essentials	Tax Return Plus	Tax Return Platinum
Personal UK-accredited accountant All our partner accountants are UK-based, accredited members of a professional body (like ACCA, CIMA, or CTA), and have at least 5 years of experience. Our Taxfix platform ensures they are delivering a great service.	✓	✓	✓
Your Self-Assessment filed Your accountant prepares your return using the information you provide, requests any missing details, and gets your final approval online. Once approved, they file it directly with HMRC for you.	✓	✓	✓
Tax return optimisation Your accountant will claim all eligible expenses and tax reliefs you're entitled to. Our onboarding is designed to find these opportunities so you never overpay.	✓	✓	✓
Accuracy Guarantee If your Accountant makes an error on your return, Taxfix will refund you in full, and offer the opportunity to re-submit your return at no additional cost	✓	✓	✓
Message your accountant Your accountant is available during the filing process to chat through any questions you may have.	✓	✓	✓
HMRC letter support If you receive a letter from HMRC that you don't understand, just upload it to the platform. Your accountant will review it, explain what it means in plain English, and provide you with the exact steps you need to take.	—	✓	✓
Coverage for HMRC investigations In the event of an HMRC enquiry into a return we filed, your accountant will provide expert Q&A support. This includes a 30-minute call and drafting one response to HMRC on your behalf.	—	✓	✓

	Tax Return Essentials	Tax Return Plus	Tax Return Platinum
Personal tax summary After filing, you'll receive a detailed summary of your tax liability and reliefs claimed.	—	✓	✓
Tax return consultation call Schedule a 15-minute consultation call with your accountant to discuss your Self Assessment tax return.	—	✓	✓
UTR registration A UTR (Unique Taxpayer Reference) is required to file. If you're filing for the first time and don't have one, your accountant will handle the full registration process for you.	—	✓	✓
HMRC agent service As your officially registered tax agent, HMRC correspondence comes directly to us. We will review all communications, proactively handle any questions or issues directly with HMRC on your behalf, and keep you informed. You don't have to worry about interpreting complex letters or responding.	—	—	✓
Year-round accountant support Message your personal accountant any time throughout the year, even about topics not related to your return (e.g., capital gains, property, investments, or tax planning).	—	—	✓
Strategic tax planning calls Book up to 3 x tax advice consultation calls with your accountant to proactively plan your finances. For example: - An end-of-year/new-year planning call - A post-Budget tax review - An ad-hoc call on investments or savings.	—	—	✓

General Service Items

	Tax Return Essentials	Tax Return Plus	Tax Return Platinum
Option to review and approve before submission	✓	✓	✓
One amendment within 12 months	✓	✓	✓
Additional amendments (Extra changes may include a £25 fee)	—	—	—
References (lender, visa, letters, etc.) (Can be arranged separately with your accountant)	—	—	—
VAT, Bookkeeping, Tax planning, Trusts (SA900), Partnership (SA800)	—	—	—
Bookkeeping limit (Covers up to 20 documents or 200 transactions)	✓	✓	✓
All your tax documents in one place	✓	✓	✓
Logging in to Gov Gateway	—	—	—
Calculating data from other foreign returns	—	—	—
Logging into external software	—	—	—
Tapered pension calculations	—	—	—
Disclosures (Can be arranged separately if needed)	—	—	—
Manual review of all your claimed expenses	✓	✓	✓

Income-specific Coverage & Limits

Self-employed Income

	Tax Return Essentials	Tax Return Plus	Tax Return Platinum
Bank or invoice uploads (up to 20 docs) Over 20? We'll ask for a spreadsheet instead	✓	✓	✓
External spreadsheet import	✓	✓	✓
Bookkeeping	—	—	—
SA302	✓	✓	✓
Tax-saving advice	—	—	—

CIS Income

	Tax Return Essentials	Tax Return Plus	Tax Return Platinum
Full CIS rebate calculation and secure submission	✓	✓	✓
Help maximising eligible refunds	✓	✓	✓
Extra bookkeeping (over 20 docs or 200 transactions) Can be quoted separately if needed	—	—	—

Rental Income

	Tax Return Essentials	Tax Return Plus	Tax Return Platinum
Unlimited properties (spreadsheet input)	✓	✓	✓
Real Time CGT 60-day return & computation Available as an additional service	—	—	—

Capital Gains (Shares, Crypto, RSUs)

	Tax Return Essentials	Tax Return Plus	Tax Return Platinum
Simple gain calculation (up to 10 disposals) Based on accurate and relevant documents	✓	✓	✓
Exchange-rate conversion (single period)	✓	✓	✓
Full CGT computation, multi-year RSUs, S104 share pools, crypto CSV parsing	—	—	—
Multi-Year Gain Reporting Each year requires a separate return	—	—	—

Foreign income & residency

	Tax Return Essentials	Tax Return Plus	Tax Return Platinum
Split-year treatment & remittance basis claim	✓	✓	✓
Simple Overseas Workday Relief calculations Complex cases are handled as an additional service	✓	✓	✓
Translation of foreign docs Please provide English versions of any documents	—	—	—
HS302 & detailed treaty analysis Available separately as a specialist service	—	—	—