

What's included in our tax return service?

This document explains what's included in our tax return service, as well as any additional services that may come with an extra charge. If you need help with something outside of your tax return, we can guide you on the best way to get support.

Tax Return Service

General Service Items

Task	Included	Not Included	Additional Info
Professional clearance	✓	-	-
One amendment within 12 months	✓	-	-
Additional amendments	-	✗	Extra changes may include a £25 fee
HMRC calls (one per filing)	✓*	-	Discretionary
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
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

Income-specific Coverage & Limits

Self-employed Income

Task	Included	Not Included	Additional Info
Bank or invoice uploads (up to 20 docs)	✓	-	Over 20? We'll ask for a spreadsheet instead
External spreadsheet import	✓	-	-
Bookkeeping	-	✗	-
SA302 and income letter	✓*	-	Discretionary goodwill item
Tax-saving advice	-	✗	See tax advice service

CIS Income

Task	Included	Not Included	Additional Info
HMRC repayment follow-up (once per quarter)	✓	-	We'll contact HMRC to check on your repayment
HMRC repayment follow-up (paid in advance)	-	✗	We can't contact HMRC without authorisation
CIS rebate calculation and submission	✓	-	-
Extra bookkeeping (over 20 docs or 200 transactions)	-	✗	Can be quoted separately if needed

Rental Income

Task	Included	Not Included	Additional Info
Unlimited properties (spreadsheet input)	✓	-	-
Real Time CGT 60-day return & computation	-	✗	Available as an additional service
Let Property Campaign disclosure	-	✗	Specialist service available separately
SA302	✓*	-	Discretionary goodwill item

Capital Gains (Shares, Crypto, RSUs)

Task	Included	Not Included	Additional Info
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

Task	Included	Not Included	Additional Info
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