

What's included in our tax return service?

This document explains what's included in our tax return service, 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 toward 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 Service

General Service Items

Task	Included	Not Included	Additional Info ¹
End-to-end tax return preparation and filing	✓	-	-
Direct submission to HMRC	✓	-	-
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

¹ Additional or specialist services are only carried out after a separate quote and your approval.

			documents or 200 transactions
Message your accountant with any questions related to your tax return	✓	-	-
Manual review of all your claimed expenses	✓	-	-
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

Income-specific Coverage & Limits

Self-employed Income

Task	Included	Not Included	Additional Info ¹
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	-	✗	See tax advice service

CIS Income

Task	Included	Not Included	Additional Info ¹
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

Task	Included	Not Included	Additional Info ¹
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	✓ ²	-	Discretionary goodwill item

Capital Gains (Shares, Crypto, RSUs)

Task	Included	Not Included	Additional Info ¹
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 ¹
Split-year treatment & remittance basis claim	✓	-	-
Simple Overseas Workday Relief calculations	✓* ₂	-	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