

## Choose the right service for you...

At Sheards we recognise that the needs of each of our clients is different. That's why we offer a tiered service which caters to those various needs:



**SOLE TRADER** - a comprehensive accounts and tax service for self employed business owners



Our **PROFESSIONAL** service is for those that need ongoing, reliable information on business performance



**ESSENTIALS** - for those business owners who need our support to meet their mandatory obligations



Our **MENTOR** service will suit those who think deeply about their business and their own performance within it

	Sole Trader	LIMITED COMPANY		
		Essentials	Professional	Mentor
<b>Monthly Price From (excl.VAT)</b>	<b>£70</b>	<b>£90</b>	<b>£140</b>	<b>£180</b>
Year End Accounts	Y	Y	Y	Y
Cloud Software Licence *	Y	Y	Y	Y
Tax Return For One Individual	Y	Y	Y	Y
Year End Sign Off Meeting	Y	Y	Y	Y
Ongoing Support Via Email & Phone	Y	Y	Y	Y
Use Of Meeting Room **	Y	Y	Y	Y
Remuneration Tax Planning		Y	Y	Y
Corporation Tax Return		Y	Y	Y
Annual Confirmation Statement		Y	Y	Y
Board Minutes		Y	Y	Y
Tax Investigation Service			Y	Y
Quarterly Management Accounts			Y	Y
Budgets/Forecasts				Y
Quarterly Review Meeting				Y
Business Mentor Workshops				Y
Client Lunches ***				Y

\* Cloud accounting software we work with is Quickbooks, Sage and Kashflow  
 \*\* We simply ask for a donation to our charity of the year for use of the meeting room  
 \*\*\* Client lunches will take place twice a year and will include planned conversations around specific current business challenges and will be limited to 10 attendees per lunch

Let us know if none of the packages above exactly fits your needs and we can create one for you.

We offer a completely bespoke service to those business owners wanting to clarify their vision, or help in ensuring that they remain on track. Ask us about our Business Advisory services.

### Services we offer that are not included within these packages are:

- Book-keeping
- VAT returns
- Migration to Cloud Accounting
- Payroll
- Pensions Auto Enrolment
- Forms P11D