

GMS Business Accountants Ltd
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Company No: 12475920

Services, Scope, Support.

Introduction

Thank you for the opportunity to provide this proposal. This document sets out the accountancy and support services we can provide, what is included within the quoted fee, and how work outside the agreed scope will be charged.

Our aim is to offer clear, practical advice, proactive support, and transparent pricing — helping you stay compliant while making informed business decisions.

Scope of Services

Services will be tailored to your business needs and reviewed annually depending on your ongoing requirements. A list of available services is provided below. Your proposal will be customised to your specific business needs.

Annual Services

- Sole Trader Tax Return
- Self-Assessment
- Limited Company Accounts and Tax Return
- Partnership Tax Return including SA
- Confirmation Statement which Includes Companies House Fee

Weekly/Monthly/Quarterly Services

- Payroll charged Per Employee per Month
- VAT Return charged Per Return
- Making Tax Digital for Income
- Book-keeping charged Per Hour
- Management Accounts – Per Hour
- Management Accounts – Day Rate
- Financial Controller – Per Hour
- Financial Controller – Day Rate

One Off Services

- Setting up VAT
- Setting up Payroll & NEST Pension
- Setting up a Limited Company which Includes Companies House Fee

Company Number: 12475920 VAT Number: 502700738

Services Include:
Personal and Business Tax Returns, Payroll, Book-Keeping, Management Accounts

Fees and Scope of Work

The fees in the quote cover only the services selected there and the scope set out below. They are based on the information available when the quote was prepared.

Included Services

Where a service is selected in the quote, the following standard scope applies:

- **VAT returns:** Preparation, review and submission of the VAT return using the records provided.
- **Payroll:** Processing the agreed regular monthly payroll, including one change instruction per pay run. Each additional change is charged at £5 plus VAT.
- **Limited company year-end accounts and Corporation Tax return:** Preparation of the annual accounts and Corporation Tax return, reconciliation of the balance sheet accounts, one client review meeting of up to an hour, and filing of the approved documents with Companies House and HMRC.
- **Self-Assessment:** Preparation of the tax return, one online review meeting of up to 30 minutes, and submission to HMRC once approved.
- **Sole traders:** Preparation of the sole trader accounts and Self-Assessment tax return, one client review of up to 45 minutes, and submission to HMRC once approved.
- **Making Tax Digital for Income Tax:** Preparation and submission of the selected quarterly updates and/or annual submission using the records provided.

Any additional meetings are charged at £75 per hour, plus VAT.

Records, Additional Work and Support

- **Records and additional work:** Quoted fees assume that complete, accurate and up-to-date records are provided by the agreed deadline, with transactions entered, appropriately categorised and reconciled. If bank statements or unprocessed records are provided, or records require review, correction, reconciliation, reworking or reconstruction, the additional work is charged at £75 plus VAT per hour. This also applies to repeated follow-up or changes requested after records have been confirmed as complete.
- **Making Tax Digital record preparation:** Any additional work required for quarterly updates, including bookkeeping, reviewing or correcting transactions, bank reconciliations, or reworking incomplete or inaccurate records, will be charged at £75 plus VAT per hour.
- **Routine communication:** Reasonable routine emails and telephone queries relating directly to a selected service are included where they can be answered without investigation, calculations, research, review or amendment of records, or contact with a third party. Substantive work, repeated correspondence or advice outside the agreed scope is charged at £75 plus VAT per hour.
- **HMRC and letters:** Routine submissions specifically included in a selected service are covered by the quoted fee. Other HMRC correspondence, telephone calls, online messages, follow-up work, enquiries, payment issues, penalties, appeals and investigations are charged at £75 plus VAT per hour. Letters prepared on your behalf are charged at £75 plus VAT each and include one client review; further amendments or related work are charged at £75 plus VAT per hour.
- **Optional monthly support:** Ongoing routine advice is available for £75 plus VAT per month, including up to one hour of email or telephone support. Unused time does not carry forward. Time beyond one hour, or support requiring detailed calculations, research, review of records or third-party contact, is charged at £75 plus VAT per hour.

Wherever reasonably possible, we will explain any additional work and its likely cost before proceeding. No additional fee applies where work is required solely to correct an error made by GMS Business Accountants Ltd.

Software is invoiced separately at cost. Prices apply to the current calendar year and may change from April; we will provide as much notice as possible. Payment is due within 14 days of the invoice date.

Fees, Completion of Work, Cancellation and Client Delays

Our agreed fees relate to the preparation and completion of the services specified in the proposal and are not solely dependent on the submission of documents to HMRC or Companies House.

Invoicing for Work Completed

Fees will be invoiced as work is completed, including work completed in stages, unless an alternative payment arrangement has been agreed in writing.

Where preparation work has been substantially completed, we reserve the right to invoice up to 100% of the agreed fee, even where submission remains outstanding due to:

- Delayed or outstanding client approval;
- Unanswered queries or missing supporting information;
- The client failing to respond or deciding not to proceed with submission;
- The client deciding to cancel the engagement or appoint another accountant.

Where the full agreed fee has been invoiced, any remaining work within the original agreed scope will be completed once the necessary information and approval have been received, subject to our continued engagement and applicable filing requirements.

Cancellation or Change of Accountant

Where an engagement is cancelled, or the client decides to appoint another accountant before the work is substantially complete, we reserve the right to invoice a reasonable amount reflecting the work already undertaken, up to the agreed fee.

This includes partially completed accounts, tax returns, bookkeeping and other agreed services. The amount invoiced will reflect the work genuinely completed at the date the engagement ends.

Additional Work and Payment Terms

Additional work arising from amended or incomplete information will be charged in accordance with our agreed terms, £75 per hour plus VAT.

No charge will be made for work required solely to correct an error made by GMS Business Accountants Ltd.

Invoices are payable within 14 days of issue.

Best Wishes,

Graham Wesson
Owner/Director

Company Number: 12475920 VAT Number: 502700738

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