

Hello!

Thank you for your interest in **Optimise Accountants & Tax Advisors**.

We have generated and sent your very own personalised quotation based on your information provided. As a firm of chartered accountants, we pride ourselves on the expertise and value we can deliver to your business. We have packages to cover all needs and budgets, our packages include;

**Xero Licence** - All of our packages include a FULL Xero licence, allowing to view the financial performance of your business on the move!

**Year End Accounts** - Company accounts produced with relevant disclosures and reporting standards, all submitted before the deadline. Lovely!

**Self-Assessment (SA100) / Partnership tax return (SA800)** - Never worry about a late filing penalty again.

**Dedicated Accountant** - When you join Optimise Accountants, you'll be introduced to your very own dedicated accountant, providing you and your business with the support and advice so it can start, grow and succeed.

**All accountancy filings to HMRC and Companies House** - Compliance soon builds up, so many deadlines, so little time. Let us worry about that.

**Corporation Tax Return** - That's right, even companies have to file a tax return!

**Confirmation Statement** - Annual updates signed, sealed and delivered.

**Dext Licence** - Access to all invoice & receipt documentation at your fingertips, anywhere, anytime, included in our Digital Accountant & Optimise Business Insights packages.

**Monthly Data Capture** - All invoices & receipts will be stored in the cloud, say goodbye to those shoe boxes!

**Monthly Bookkeeping** - Our bookkeeping services includes up to 100 transactions per month, enough to cover the small/medium business owner.

**Unlimited Cloud Storage** - Don't worry about having a filing system in your office or home, we have this covered!

**Payroll Services** - Our payroll services covers 5 payslips per month, including submitting RTI & pension contributions.

**Management Accounts** - Our monthly management accounts include profit & loss, balance sheet and debtor and creditor reports in an easy, digestible format.

**Optimise Business Insights** - Take a deep dive into your business, we offer 3-way forecasting (Profit & Loss, Balance Sheet, Cash flow), KPI monitoring, visual dashboards, project tracking each quarter - let us optimise what really matters.

**Advisory Hours Each Year** - Your dedicated accountant will review the accounts, tax returns and provide on-going support throughout the business lifecycle.

**Monthly Tax Estimates** - Don't get caught out with payments on account - we'll let you know what to expect.

So what happens now?

Your dedicated accountant will contact you within the next 24 hours to discuss your quote and answer any queries you may have. If you are just starting in business, we'll walk you through all the steps to get you up and running.

Already in business and looking to move accountant? No problem, switching accountants is simpler than filing a tax return (believe it or not!), with your permission, we'll contact your accountant and gain professional clearance to act on your behalf, pass over your records and get you started with us.

We look forward to welcoming you and your business to **Optimise Accountants & Tax Advisors.**

Yours sincerely,



Recoverable Signature

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Sean Dowd

Director

Signed by: Sean Dowd