



Packaged services

We understand that different clients have different requirements and some need more input from their accountants than others. We have therefore developed a range of packages for clients to choose from. These cover all the necessary tasks that a business needs to do just to "comply" with Companies House and tax laws and Added Value services that will benefit clients in running their businesses.

Services included:	Note*	Bronze Package	Silver Package	Gold Package
Full Financial Statements	1	√	√	√
Corporation Tax Return (CT600)	2	√	√	√
Abbreviated Accounts for filing at Companies House	3	√	√	√
AGM Minutes and statutory notices	4	√	√	√
Companies House Annual Return	5	√	√	√
Director's Personal Tax Returns	6	√	√	√
Annual meeting	7	√	√	√
Quarterly management accounts and meetings	8	-	√	√
Monthly management accounts and meetings	9	-	-	√
Annual Business Overview	10	-	√	√
Financial Review Report	11	-	√	√
Monthly e-newsletters	12	√	√	√
Statutory filing and tax payment date reminders	13	√	√	√
Master classes	14	√	√	√
Telephone and e-mail assistance	15	√	√	√
Book-keeping software, training and ongoing support	16	√	√	√
Guaranteed turnaround time for your work of less than 15 working days	17	-	-	√

Please note that we can only provide the Silver and Gold Services if we perform the book-keeping on your behalf or if you let us have back-ups of your book-keeping software every month/quarter.

Note* Please refer to the next sheet for an explanation of each service

Other services that we provide:

Personal Tax Return (for each additional partner/director)	£100
Property rental accounts (per property)**	£150
Subcontractor accounts (incl Personal Tax Return)**	£350

(** We will provide you with spreadsheets to assist you in recording your income and expenditure, to be returned to us with your records)

Book-keeping	We will build the cost of this service into the service package you require based on the number and complexity of transactions. This will be reviewed annually to ensure that you are being charged the correct amount. (We don't charge by the hour because we don't agree that by being quick, efficient and accurate we charge less than being slow, inefficient and inaccurate!)
Payroll services	We run a Payroll Bureau - please see the separate section on payroll services.
Management accounts	These include your Profit & Loss account and Balance Sheet. We ensure your book-keeping is adjusted for amounts paid in advance, costs incurred but not yet invoiced, depreciation on assets and any bad debt provisions necessary. These adjustments may have a significant effect on the figures on which you base your business decisions.
Cashflow forecasts	See your anticipated cash flow over the next 12 months. Know in advance the 'peaks and troughs' in your cash balance - plan for funding or when to book a holiday!
Business plans	Starting a business or making changes to your current one? Do you need significant funding? If so, the chances are you'll need a formal plan to explain your plans to the bank or other lenders. We'll develop one with you and negotiate with banks or other lenders to obtain the right finance package for you.
Fee Protection Service	Our charges in handling a Tax, PAYE or VAT investigation are covered in the event of an investigation by HM Revenue & Customs. The charge for this depends on the services that you require.

If for any reason these packages do not specifically meet your needs, then please discuss this with us and we can create a service to meet your needs.

Wren Accountancy Services Limited - Giving you More to help you grow your business.

Explanation of services

1 Full financial statements

These are your annual accounts in the statutory format. They include the Director's report, the Profit & Loss account, the Balance Sheet and notes to provide the information required by the Companies Act and Accounting Standards.

2 Corporation Tax Return (Form CT600)

Your tax liability is calculated based on your profit but adjusted for various items such as depreciation, disallowable items and capital allowances, amongst others. The Corporation Tax Return is the form required to report the company's tax position to HM Revenue & Customs.

3 Abbreviated Accounts for filing at Companies House

Small companies can file abbreviated accounts at Companies House. They are a slimmed down version of the full financial statements and include a Balance Sheet and greatly reduced notes. Take advantage so that your competitors cannot see your full trading results.

4 AGM Minutes and statutory notices

Companies are required by law to hold an Annual General Meeting to formally approve the accounts. We prepare the Minutes of the meetings for you.

5 Companies House Annual Return

Companies are required to file an Annual Return by law. If this is not submitted, the directors of the company can be prosecuted and the company can be struck off the Register. We will take care of this on your behalf.

6 Director's Personal Tax Returns

Directors are required to submit a Personal Tax Return each year, showing income and gains and tax allowable expenditure. We help ensure that this is completed correctly and make sure that you are paying the least amount of tax necessary.

7 Annual meeting

We discuss your accounts and the results with you and ensure that you are aware of both Tax and Financial Planning possibilities. We want to ensure the both you and your business are protected from as much tax and foreseeable problems as possible.

8 Quarterly management accounts and meetings

See your results every quarter and ensure that you have regular information on which to base your business decisions and have more regular meetings so we can discuss your business and act more quickly to results/trends shown by your management figures.

9 Monthly management accounts and meetings

Get more regular management information so that you can react quickly to business trends and changes and discuss your business every month to check your business is performing as planned and act more quickly to results/trends shown by your management figures.

10 Annual Business Overview

A comprehensive business overview summarised in a report providing additional financial information such as ratios and trends to give you a greater understanding of how your business is performing.

Explanation of services (continued)

11 Financial Review Report

Shows your financial results for the last 5 years - see the trends of your financial ratios and understand how your business is doing from the viewpoint of Management, Owners and Lenders!

12 Monthly e-newsletters

Monthly newsletters sent by e-mail and any other relevant financial news will be e-mailed to you.

13 Statutory filing and tax payment date reminders

You will be alerted in advance of the due dates for Corporation Tax, Personal Tax, PAYE and VAT payments as they arise.

14 Master classes

We will host master classes aimed at improving your business, which are available to our clients to attend FREE of charge.

15 Telephone and e-mail assistance

We do not charge for telephone calls - we are here to help and want you to discuss your business with us! If, as a result of the discussion you need additional advice or services, we will provide you with our quote prior to performing any work.

16 Book-keeping software, training and ongoing support

We want to ensure that you get the most out of the software and we want to know that we are basing our advice on accurate financial information. We provide the necessary training to ensure this happens. We provide continued support to help you with any problems that arise.

17 Guaranteed turnaround time for your work of less than 15 working days

We will make sure we've drafted the accounts, discussed any queries with you, finalised and arranged a meeting with you, within 15 days of receiving all of your records.



wren accountancy services Ltd.

Giving you More to help you grow your business

For a full quotation for your packaged services please contact us:

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