

Adding Value to Your Business and Balance to Your Life

Clear Vision Services

Business Consultancy	Services Agreed
Vision Day – helping you establish where you are in life and in business, and more importantly where you want to go and how to get there	
Team Day – How to take your team on your journey towards your Vision with you	
One Page Business Plan – the key non-financial measurements you need to improve to drive your business growth	
Mystery Shop exercise – gauge the first impression of your business and how it compares to your competitors	
Monthly / Quarterly Board Meetings – to hold you accountable to your vision, mission, core values, and your business and personal goals	√
Business Performance	
Ratio and trend analysis - to get down to the areas where profit potential exists in your business	
5 year summary report and analysis – to show a comparison of performance over the period	
Rolling Cashflow Forecast – 13 week forecasting tool to help you manage your business cashflow	
Cash Usage report – to show how you are using the cash in your business	√
Personal Balance sheet – Keeps track of your personal wealth so ‘whole picture’ decisions are made	
Financial healthcheck on your business - (monthly / quarterly / twice yearly) as appropriate	
Xero online bookkeeping software and monthly license	
Taxwise Fee Protection Insurance – to provide peace of mind against the extra cost of HMRC investigation work	
Accountancy Service	
Annual Accounts - timely and accurate accounts to meet HMRC deadlines – includes annual accounts review meeting	√
Operational Summary – a review of key measurements from your accounts together with a summary of your corporate and personal tax position	√
Monthly / Quarterly bookkeeping - as required	
Quarterly Management Accounts – interim data on your business performance to aid decisions and growth	
Monthly Management Accounts and Analysis report – interim data on a monthly basis to aid your business decisions and growth	
Monthly check of data input onto Xero	

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Personal Tax	
Personal Tax Return – preparation of your return early so you can mitigate your liability and budget to pay your bill	√
Guarantee to accurately calculate your tax liabilities and submit your return on time	√
Healthcheck – a critical review of your personal tax affairs via our taxability checklist to save you cash	√
Company Tax	
Corporation Tax Return – preparation of your return, calculation of your liability, IXBRL preparation and submission	√
Research & Development tax credit claim – preparation and submission	
Partnership Tax Return - preparation of your return, calculation of your liability and submission of return to meet HMRC deadline	
Healthcheck - a critical review of your company tax affairs via our taxability checklist to save you cash	√
VAT	
VAT return – calculation and submission of your return	√
Company Secretarial	
Act as your registered office	√
Deal with your statutory paperwork	√
File your annual return and company forms	√
Payroll	
Monthly payroll administration	√
RTI submission	√
Auto enrolment calculation and administration	√
P11D and Class 1A NIC calculation	√
Complimentary services	
Unlimited telephone and email support and guidance	√
Secure client portal to safely exchange information and sign off documents – to save you time and money	√
Free training and events – to keep you up-to-date with legislation and ideas to develop your business	√
Pay Less Tax quarterly newsletter	√
Monthly business owner news round-up e-zine	√
Free onsite parking at our premises	√
Credit rating report	√
Three-way meetings with your Bank Manager and Financial Planner – if you would like to include them in our meetings	√
Press Release Service – our marketing specialist will discuss and prepare a release for you to circulate to the local media	√