

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	√
Financial Forecast – An integrated one year forecast to include cashflow, profit and loss and balance sheet, together with assumptions dictated by you. Sensitivity scenarios can be added as appropriate	√
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	

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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	
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	√