What's included in our tax return services?

This document explains what's included in our tax return services, along with details on any areas that may fall outside the usual scope. If you need support with something beyond your tax return, we'll happily guide you towards the best next step. From there, you can decide whether to add an extra service or simply continue without it, and of course, you may be eligible for a refund if you choose not to proceed.

Tier comparison

	Reviewed & Filed	Optimised & Protected	Year-Round Tax Partner
A UK-based accredited accountant (ACCA, CIMA, or CTA, with 5+ years' experience) reviews your return for accuracy and files it directly with HMRC. You complete the questionnaire and upload your documents; your accountant prepares the return, follows up on anything missing, and submits it once you approve it online.	✓	✓	✓
If your accountant makes an error on a submitted return, Taxfix will refund you in full and let you re-submit at no extra cost. This applies only where the error is solely due to the accountant's service and you provided all relevant information through the platform or during the service.	✓	✓	✓
We connect with HMRC to pull in your PAYE income details automatically, including wages, tax paid, and deductions. That means no searching for P60s or P45s and no manual entry of income figures.	✓	✓	✓
Filing-related messaging, including direct access to your accountant on matters connected to the accurate preparation and filing of your return, including documents, disclosures, and return details.	✓	✓	✓
20-minute call with your accountant to review your situation and identify ways to reduce your tax bill. This covers both claims for past expenses, allowances, and reliefs, and forward-looking planning such as pension contributions or income structuring.	—	✓	✓
If HMRC opens an enquiry into a return we filed, your accountant provides expert support. This includes a 20-minute call to explain what HMRC is asking and drafting one response to HMRC on your behalf.	—	✓	✓
If you receive a letter from HMRC you don't understand, upload it to the platform. Your accountant will review it, explain it in plain English, and tell you exactly what steps to take next.	—	✓	✓

	Reviewed & Filed	Optimised & Protected	Year-Round Tax Partner
A UTR (Unique Taxpayer Reference) is required for Self Assessment. If you're filing for the first time and don't yet have one, your accountant will handle the registration with HMRC as part of the service.	—	✓	✓
You can message your accountant or book calls throughout the year on any tax topic, from capital gains to pensions.	—	—	✓
Your accountant is registered with HMRC as your authorised agent and manages HMRC correspondence on your behalf. Once set up, they review communications, respond where needed, and keep you informed, so you're no longer handling HMRC contact alone.	—	—	✓
Annual tax efficiency review, including a review of your overall tax position and clear recommendations on allowances, structuring opportunities, and other actions relevant to your circumstances.	—	—	✓

General Service Items

	Reviewed & Filed	Optimised & Protected	Year-Round Tax Partner
Option to review and approve before submission	✓	✓	✓
One amendment within 12 months	✓	✓	✓
Additional amendments (Extra changes may include a £25 fee)	—	—	—
References (lender, visa, letters, etc.) (Can be arranged separately with your accountant)	—	—	—
VAT, Trusts (SA900), Partnership (SA800)	—	—	—
Bookkeeping limit (Covers up to 20 documents or 200 transactions)	✓	✓	✓
All your tax documents in one place	✓	✓	✓

	Tax Return Essentials	Optimised & Protected	Year-Round Tax Partner
Logging in to Gov Gateway	—	—	—
Calculating data from other foreign returns	—	—	—
Logging into external software	—	—	—
Tapered pension calculations	—	—	—
Disclosures (Can be arranged separately if needed)	—	—	—

Income-specific Coverage & Limits

Self-employed Income

	Reviewed & Filed	Optimised & Protected	Year-Round Tax Partner
Bank or invoice uploads (up to 20 docs) Over 20? We'll ask for a spreadsheet instead	✓	✓	✓
External spreadsheet import	✓	✓	✓
Bookkeeping platform access	✓	✓	✓
SA302	✓	✓	✓
Tax-saving advice	—	✓	✓

CIS Income

	Reviewed & Filed	Optimised & Protected	Year-Round Tax Partner
Full CIS rebate calculation and secure submission	✓	✓	✓
Help maximising eligible refunds	—	✓	✓

CIS Income

	Reviewed & Filed	Optimised & Protected	Year-Round Tax Partner
Help maximising eligible refunds	—	✓	✓

Capital Gains (Shares, Crypto, RSUs)

	Reviewed & Filed	Optimised & Protected	Year-Round Tax Partner
Simple gain calculation (up to 10 disposals) Based on accurate and relevant documents	—	✓	✓
Exchange-rate conversion (single period)	—	✓	✓
Full CGT computation, multi-year RSUs, S104 share pools, crypto CSV parsing	—	—	—
Multi-Year Gain Reporting Each year requires a separate return	—	—	—

Foreign income & residency

	Reviewed & Filed	Optimised & Protected	Year-Round Tax Partner
Split-year treatment & remittance basis claim	✓	✓	✓
Simple Overseas Workday Relief calculations Complex cases are handled as an additional service	✓	✓	✓
Translation of foreign docs Please provide English versions of any documents	—	—	—
HS302 & detailed treaty analysis Available separately as a specialist service	—	—	—