

SOURCE ACCOUNTING TRANSFER TIMELINE

Hello! Welcome to our transfer client guide which shows you how to switch to Source Accounting

TALK TO US

We always prefer to talk to our clients first, either by telephone, Skype or a face to face meeting.

After we've had an initial chat about what you're after and whether you're a good client for us, we will get the ball rolling with the transfer process.

STEP 1

SEND LETTER TO YOUR ACCOUNTANT

We will send out a letter to your current accountant requesting all your company accounts, tax returns and any other accounting data.

If your current accountant is a chartered accountant like us, they should respond no later than 28 days.

Usually it just takes 7-10 days.

RECEIVE THE INFORMATION

Once we receive the information we will get all of your data uploaded to our systems.

If you want us to have a look at any of the work that your previous accountant has carried out then let us know!

STEP 2

TAX EFFICIENCY PLAN

Once we have reviewed the information on file and set you up fully as a client we will review your tax efficiency position.

In our experience, the number of clients joining us who have not been given proper tax planning advice is shocking!

FREEAGENT SOFTWARE

If your previous accountant was in the dark ages and didn't offer you an online software solution then you have two options:

Option 1: If you've been keeping your own spreadsheets for a number of years then continue to do so

Option 2: Switch to our FreeAgent online accounting software.

Step 3

RELAX

You're now ready to start your relationship with Source Accounting!

At this stage we will design a specialised tax plan for you and tell you exactly how much money to take out of the company.

The key thing is to be tax efficient!