

Identify affected clients
Sole traders and landlords
> £50k turnover from April 2026
> £30k turnover from April 2027
> £20k turnover from date TBC

TaxCalc Practice Manager (Report Manager)

Select the most appropriate digital record keeping solution
✓ Spreadsheets
✓ Bookkeeping software
✗ Manual cashbook

TaxCalc Spreadsheet Templates & Bookkeeping Connect

Track MTD reporting periods
Tax quarters
Jul 5, Oct 5, Jan 5, Apr 5
OR
Calendar quarters
Jun 30, Sep 30, Dec 31, Mar 31

TaxCalc Workflow

Request information
Transactional update
NOT
Management accounts

TaxCalc Communications Centre

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Supporting your MTD for Income Tax cycle

Document entire process
Stored securely in the cloud for easy access and retrieval

TaxCalc Document Manager

Obtain client approval digitally
Client approves final declaration to submit tax return

TaxCalc eSign Centre

Prepare and file end of year tax return
31st January filing deadline

TaxCalc Tax Return Production

File quarterly updates
1 month filing deadline

TaxCalc MTD Quarterly Filer
Coming April 2025