A comprehensive collection of
useful forms, letters and tools
that every practitioner needs.

2020 Innovation®

Forms, Letters & Tools 2015

Completely upgraded for 2015 including over 430 forms, letters and tools

Prices held for 2015

Forms, Letters & Tools 2015

Completely upgraded for 2015 including over 430 forms, letters and tools

This comprehensive collection of over 430 useful forms, letters and tools is an essential product for every accountancy firm. The product compiles all of the forms and letters that you need for the day to day running of your practice and have been updated for 2015.

Forms Letters & Tools is a product to build “systems” so that everyone in the practice is using the same “tools” and working in similar ways.

Forms, Letters & Tools covers the essential elements of your practice:

- Accounts Preparation, Planning and Working
- Administration – Practice Forms
- Staff Administration
- Audit and Assurance
- Corporate Finance
- Financial Services
- Interactive Checklists
- Marketing and Cross Selling
- What if? Tool
- Paperless Office
- Practice Assurance
- Practice Management
- Taxation and Payroll Tools
- Numerous template letters covering personal and corporate tax, accounts, client engagement and disengagement, VAT, PAYE etc.
- Word Tips

“ As far as we were concerned, purchasing Form Letters and Tools was a no brainer. This is such a useful resource that we would not be without it now and it means that whichever member of the team uses it, we are always consistent.”

Heather O’Reilly, Jupp Castle

A few highlights for 2015

PAYROLL SYSTEMS

Are you still delivering paper payslips? Many clients, when asked, would prefer to have payslips delivered electronically to their staff!

There are lots of other ways to streamline the payroll department. The tools in this product provide guidance and help to move the payroll department into the 21st century, including a questionnaire for your payroll clients.

INTERACTIVE CHECKLISTS

We find that some of the least known but most powerful tools in the product are the interactive checklists. Once installed as a standalone program in its own right, there are a variety of checklists that you can work through to ensure everyone is delivering service and advice to the same standard. These include a "pre year end meeting" checklist, "taking on a new client" checklist and "accounts quality control" checklist.

WINNING CLIENTS

Another popular tool is the "winning clients" model, offering the ability to tailor a list of points for discussion at a meeting with prospective clients. Pre-populated with many tax planning and other practical help areas, it also has the ability for user defined input prior to the meeting.

GRAPHING TOOL

A common 2020 philosophy is "being different". Whilst software tends to generate accounts with a similar look and feel, it is possible to differentiate your delivery by adding to the accounts pack. Graphs offers a simple way of doing this – and so few do it! The graphing tool has been developed over a number of years and allows up to five years of information to be displayed. The graphs auto-adjust to the number of years' information available.

SHOULD YOU NOT BE COMPLETELY SATISFIED WITH THE PRODUCT, FORMS, LETTERS & TOOLS COMES WITH A FULL 28 DAY MONEY BACK GUARANTEE

Forms, Letters & Tools 2015

ACCOUNTS

- Accounting Records Request Checklist
- Accounts Planning
- Accounts Preparation Checklist
- Accounts to Client
- Accounts Working Papers
- Adding Value Checklist
- Audit Price List
- Breakeven Analysis
- Breakeven Graphical
- Briefing Sheet
- Cash Balance Projector
- Client Manager System **UPDATED**
- Client Permanent Information
- Client Software Record
- Client System Adjustments
- Computerised Work Programs
- Farmers Stock Sheet
- Five Year Analytical
- Five Year Summaries
- Graphing Tool
- Lead Schedules
- Loan Calculator
- Meetings Notes
- Notes and Queries
- Period Procedures
- Pre Year End Meeting Notes
- Preparing for Meetings (Mind Map)
- Sparklines - Mini Graphs
- TB Reconciliation
- VAT Tracker
- Where Did The Money Go?
- Working Papers Index Sheet

ADMINISTRATION

- Additional Information (New Client) **UPDATED**
- Authority to Disclose Information
- Billing Instructions **UPDATED**
- Billing Text **UPDATED**
- Client Account Cheque Request
- Client Tax Repayment Letter of Assignment
- Course Evaluation Form
- CPD Records
- Customer Care Checklist
- Database Amendment Form
- Delegation and Action Tools
- Disbursements Record **UPDATED**
- Expenses Claim Form **UPDATED**
- Fax Cover Sheet
- File Note
- Fit and Proper Forms
- HMRC Authority
- Implementing Direct Debits
- Money Laundering ID Form
- New Client Forms **UPDATED**
- Permanent File Index Sheets
- Personal Guarantee for Directors
- Standing Order Mandate
- Time Sheet

ADMINISTRATION - STAFF

- Applicant Reference Request
- Appraisal Pre-Review
- Development Diary
- "Fit and Proper" Forms
- Job Application - Non Technical
- Job Application - Technical
- Job Employment and Reference Letters
- Job Letter - No Vacancy
- New Employee Information **UPDATED**
- Personal Development Plans
- Record of Achievement
- Social Media Policy **NEW**
- Staff Appraisal Form
- Staff Feedback Form
- Staff Induction Form
- Staff Interview Questions Form **UPDATED**
- Staff Job Descriptions
- Staff Planner **UPDATED**

AUDIT AND ASSURANCE

- Bank Audit Request
- Bank Acknowledgement Letter
- Letter of Representation
- Management Governance Letter
- Stocktake Checklist

A comprehensive list of the tools within each section

CORPORATE FINANCE

- Business Plan Guidance Notes, Template & Review Checklist
- Cash Flow Marketing Letter
- Corporate Finance Marketing Letter
- Due Diligence Engagement Letter, Sample Work Programme & Letter to Accountant
- Exit Strategies Marketing Letter
- Letter to Reporting Accountants
- Pre Lending Qualification Checklist
- Preliminary Review Meeting Checklist
- Simple 12 Month Profit & Loss and Cash Flow
- Simple Company Valuation
- Strategic Planning Introductory Letter
- Strategic Planning Template & Checklist
- Valuations Tools, Share Valuation Checklist & Sample Valuation Report Contents

FINANCIAL SERVICES

- Financial Services Lead Generators
- Pension Calculator
- Referral Checklist
- Stakeholder Pension Calculator

MARKETING

- 7 Point Planning Checklist
- Marketing Planner Guide
- Marketing Programme
- Organising Direct Mail
- Personal Affairs Checklist
- Profit Improvement Plan
- Reception Slideshow
- Seminar Planning Checklist
- Service and Product Matrix
- Staff Performance Standards
- Tough Times Checklist
- Tough Times Letter
- Winning Clients

MISCELLANEOUS

- Agenda Creator
- Business Analyst

PAPERLESS OFFICE

- Accounts Attachments
- Company Formation

PRACTICE ASSURANCE

- 2020 Audit Compliance
- 2020 Audit File Checklist
- Annual Compliance Review
- Client Due Diligence Review
- Compliance Review Areas
- DPB Annual Compliance Review Checklist
- DPB Corporate Finance Review

PRACTICE MANAGEMENT

- Client Portal Uses
- Client Satisfaction Survey Questionnaire
- Intranet - Benefits and uses of a Firm Intranet
- Key Practice Performance Indicators
- Partners Retreat – Agenda Topics
- Social Media Checklist
- Staff Feedback/Appraisal System
- Top 25 Profit Improvement Tips for Practices

TAXATION AND PAYROLL

- 20+ Steps to Create a Tax Return **UPDATED**
- Auto Enrolment Action Pack **NEW**
- Auto Enrolment Planner **NEW**
- Auto Enrolment Pricing Tool **NEW**
- Car Co2 Emissions Record
- Form P11D Information **UPDATED**
- Missing Information Sheet
- Payroll Cross Selling **UPDATED**
- Payroll Systems **UPDATED**
- Pension Contribution Calculator **NEW**
- RTI Monthly
- RTI Weekly
- Tax Liabilities Schedule **UPDATED**

Forms, Letters & Tools 2015

TEMPLATE LETTERS

ADMINISTRATION

- Audit Proposal Letter
- Bookkeeping Memorandum **UPDATED**
- Cash Collection System
- Fixed Price Agreement
- Handover Letter - Payroll Information
- Handover Letters
- Online Authority Letters
- Provision of Services Act Information **UPDATED**
- Unincorporated Business Proposal Letter
- Sample Engagement Letters
  - Bookkeeping Engagement Letter **UPDATED**
  - Charity Audit Engagement Letter **UPDATED**
  - Charity Independent Examination **UPDATED**
  - Company Assurance Review Engagement Letter **UPDATED**
  - Company Audit Engagement Letter **UPDATED**
  - Company No Audit Engagement Letter
  - Disengagement Letters **UPDATED**
  - Engagement Covering Letters
  - Engagement Letter Limited Company Charity
  - Engagement Letter LLP **UPDATED**
  - Engagement Standard Terms Letter 1
  - Engagement Standard Terms Letter 2
  - Partnership Memorandum of Services
  - Payroll Engagement Letter **UPDATED**
  - Portal Version of Engagement Letters **UPDATED**
  - Small Business Engagement Letter **UPDATED**
  - Sole Practitioner Memorandum of Services
  - Solicitors Engagement Letter
  - Solicitors Memorandum of Services
  - Tax Engagement Letter **UPDATED**
  - Trust Tax Engagement Letter **UPDATED**
  - VAT Engagement Letter

ACCOUNTS

- Abbreviated Accounts Approval Letters
- Company Accounts Letters **UPDATED**
- Reminder & Chaser Letters
- Sending Accounts to Clients

AUDIT

- Assurance Review Representation Letter
- Bank Acknowledgment of Audit
- Bank Audit Request
- Client Responsibility Letter
- Cross Selling Wizard
- Intestate Estate Distribution
- Keyman Cover
- Management Governance Letter
- Non-audit Services **NEW**
- Sample Size Calculator Tool
- Stocktake Checklist Governance
- Why Use Online Accounting?

MISCELLANEOUS

- Loan Application Reference
- State Pension Forecast Letter

TAXATION

- Deferment Letters
- Director's Salary Letters from April 2015 **UPDATED**
- Dividend Waiver Form
- Notifying Ability to Email Payslips/P60
- PAYE & Other Letters
- Taxation (1) - Preparation
- Taxation (2) - Client Letters
- Taxation (3) - HMRC Letters
- VAT Letters

INTERACTIVE CHECKLISTS

- Accounts Preparation Checklist
- New Client Setup Checklist
- Pre Year End Planning Meeting

WORD TIPS

Handy tips for Macros, AutoCorrect, Find & Replace, Auto Text, Tables, Work Buttons, Shortcuts and Online Training.

Order Form

Forms, Letters & Tools 2015

To allow for quick and easy access, Forms Letters & Tools is now delivered as a downloadable file sent via email upon successful completion of your purchase. If you prefer to receive this product on CD (sent by postal mail), there is an additional charge of £30.

PRODUCT	2020 Member	Non Member	Total
Forms, Letters & Tools 2015 Upgrade*	☐ £140.00	☐ £180.00	£
Forms, Letters & Tools 2015	☐ £199.00	☐ £295.00	£
Additional Office License	☐ £140.00	☐ £180.00	£
Optional CD (via postal mail)	☐ £30.00	☐ £30.00	£
		Subtotal	£
		VAT @ 20%	£
		Total	**£**

* Upgrade from any previous version of Forms, Letters & Tools. Each product gives you a license for unlimited use in one office only. For multiple offices you need to purchase additional office licenses, as above.

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Name

Company / Organisation

Address

Postcode

Tel

Email

PAYMENT DETAILS See above for fee calculation

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2020 INNOVATION is a leading organisation providing innovative solutions for progressive accountants and tax professionals worldwide. We recognise that firms need to constantly improve their client proposition including the use of new technologies to become ever more competitive and efficient, understanding what additional services clients are looking for and how marketing can effect these changes.

2020 MEMBERS that are looking for growth and/or improved profitability, enjoy access to the latest tools and templates, for marketing and managing their practice.

2020 also provides an extensive range of services including:

- Membership Group
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