

Tax Tips & Tools

...at your fingertips



**2014/15
Edition**

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Tax Tips & Tools

has been comprehensively updated
for the 2014/15 tax year

This latest edition of Tax Tips & Tools contains a total of 124 highly practical and easy to use tax calculators, spreadsheets, checklists and other tax tools. They are all contained on a single CD. 12 of the tools are new to this edition.

Tax Tips & Tools allows you to make complex calculations quickly and easily. For example, the Car Tax and Tax Credits Calculators allow you to advise clients on these issues in a matter of minutes – something that could otherwise take hours.

Tax Tips & Tools has been designed for tax practitioners, particularly those who serve small and medium size businesses.

If you are committed to providing your clients with tax advice which they perceive to be valuable and are happy to pay for, you absolutely need the latest edition of Tax Tips & Tools.

A brief description of just some of the other tools and a complete list of contents can be found on the following pages.



If you're wavering, subscribe...
Great value for some real in-depth and
useful analysis. Tax Tips & Tools is great!"

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SATISFIED WITH THE
PRODUCT**

What's New for 2014/15

Director Payslips

Where a salary is paid up to the personal allowance employee's NI will be due. This pay calculation shows the net pay and NI under both the Director's NI method and the alternative method.

Employment Status indicator

Based on the HMRC tool, a quick and easy way to review the status of an individual.

RTI Penalties Calculator

RTI late filing penalties come in later on in 2014/15. Late filing penalties will be levied based on the number of employees and the number of late filings. This will calculate those charges.

Tax Tips & Tools is split into the following sections:

- Inheritance and Trust Tax Tools
- Income Tax and Corporation Tax Tools
- Interactive Tax Checklists
- Payroll and Construction Industry Scheme Tools
- NI and Tax Credits Tools
- Capital Gains Tax and SDLT Tools
- Value Added Tax Tools
- Administrative and Other Tools
- Mind Maps

SA Payment Form

Based on the HMRC online tax payslip – another quick and easy way of producing a tax payslip for clients that do not have them.

Salary Sacrifice

New calculators for bikes, pensions and even cars!

Salary to PA or NI Limit?

With the Employment Allowance of £2,000 against Employers NI starting in April 2014, for many of the smaller company clients there is an urgent need to ascertain whether the directors are paid up to the NI limit or the PA limit or indeed somewhere in between. For many this will be a straightforward choice but in some instances a detailed review will be needed and will need to take into account other employees and other income received. This tool makes it easy to ascertain the optimum position.

Tax Credits 2014/15

This tool provides a provisional tax credits calculator.

VAT Partial Exemption Calculators

Quarterly summaries and annual adjustment calculations under both the standard and special scheme rules.

Tax Tips & Tools allows you to advise clients in a matter of minutes - not hours.

Upgraded for 2014/15

Car Tax Calculator

This tool takes into account the known benefit-in-kind charged over the next three years and calculates the cost to an individual and a business of providing a company car. Fully updated with rates 2014/15 – 2016/17.

Form 930 – Tax Calculator

For those of us old enough to remember how HMRC used to work in the pre Self-Assessment days, the form 930 was the way of summarising income and tax calculations. This model replicates that layout for all years from 1991/92 – 2014/15. Use this model for calculating or checking personal tax bills.

85 Tools have been upgraded for 2014. See the full list on the following pages.

Interactive Checklists

The CheckQ templates for income tax, VAT, PAYE and corporation tax have all been updated and enhanced. Use of these will aid your quality control and tax planning and ensure areas are not missed.

Should I Incorporate? (with 2014/15 bands)

This spreadsheet provides a comprehensive comparison of sole trader (or partner), extracting profit by salary or by dividend or by a combination of both methods. It then allows alternative combinations of salary and dividend as it is likely that a mixture of the two will be used in practice.

Tax Credits

Tax Credits 2013/14 and Tax Credits 2014/15 (provisional claims) will allow you to calculate any tax credits scenario quickly, easily and cost effectively.

A top-down view of a desk with a light blue background. On the left, there is a stack of white papers with a silver pen resting on top. In the center, a black tablet is tilted, displaying white text. To the right of the tablet is a white mug filled with black coffee.

**124 Tax Tips & Tools
85 Upgrades
12 Brand new Tools**

Tax Tips & Tools 2014/15 Edition

Here is a comprehensive list of the tools within each section

Inheritance and Trust Tax Tools

| | | |
|---|---|----------|
| 1 | Estate Valuation | UPGRADED |
| 2 | IHT Annual Gifts out of Income Summary form | UPGRADED |
| 3 | IHT - Quoted Securities Valuation Tool | |
| 4 | Inheritance Tax Calculator | |
| 5 | Intestacy Rules Handout | |
| 6 | Trust Tax Calculators | UPGRADED |

Income Tax and Corporation Tax Tools

| | | |
|----|--|----------|
| 7 | AddBacks Comparison | UPGRADED |
| 8 | Admitting a Partner | UPGRADED |
| 9 | Beneficial Loan Calculator | |
| 10 | Bonus v Dividend Model | UPGRADED |
| 11 | Car Benefits v FPCS | |
| 12 | Car CO2 Emissions Listing Sheet | |
| 13 | Car Tax Calculator | UPGRADED |
| 14 | Change of Accounting Date | UPGRADED |
| 15 | Corporation Tax Calculator | |
| 16 | Deferred Tax Calculator | UPGRADED |
| 17 | Director Payslips | NEW |
| 18 | Director Salary Letters | UPGRADED |
| 19 | Disincorporation Calculator | UPGRADED |
| 20 | Dividend Taxation | UPGRADED |
| 21 | Effective Tax Rates - Profit Extraction | UPGRADED |
| 22 | Extraction of Funds - Grossing Up Calculator | UPGRADED |
| 23 | Farming Losses Calculator | |
| 24 | Flat Rate Expenses | UPGRADED |
| 25 | Form 930 - Tax Calculator | UPGRADED |
| 26 | Form 930 - What If? Calculator | UPGRADED |
| 27 | Fuel Benefit Checker | UPGRADED |
| 28 | Furnished Holiday Lettings - Interactive PDF | UPGRADED |
| 29 | Furnished Holiday Lettings - Data Recording | UPGRADED |
| 30 | Gift Aid Summary | UPGRADED |
| 31 | High Income Child Benefit Charge | UPGRADED |
| 32 | Incorporation Action Checklist | UPGRADED |

| | | |
|----|---|----------|
| 33 | Incorporation Elections | UPGRADED |
| 34 | Incorporation Issues | UPGRADED |
| 35 | Interactive Mileage Expenses Calculator | UPGRADED |
| 36 | Lease Buy or Contract Hire | UPGRADED |
| 37 | Maximum AIA Calculators | UPGRADED |
| 38 | Maximum Dividend Calculators | NEW |
| 39 | Maximum Pension Contributions | UPGRADED |
| 40 | Pension - Certificate of Earnings | UPGRADED |
| 41 | Pension - Company or Personal Contribution? | UPGRADED |
| 42 | Pension Planning Letter | UPGRADED |
| 43 | Pre-Incorporation Questionnaire | UPGRADED |
| 44 | Property Inside or Outside a Company? | UPGRADED |
| 45 | Research & Development Tax Credits Calculator | UPGRADED |
| 46 | Salary Sacrifice - Bikes | NEW |
| 47 | Salary Sacrifice - Cars | NEW |
| 48 | Salary Sacrifice - Pensions | NEW |
| 49 | Salary v Dividend Model | UPGRADED |
| 50 | Salary to PA or NI Limit | NEW |
| 51 | SEIS Tax Relief Calculator | |
| 52 | Should I Incorporate? | UPGRADED |
| 53 | Should I Incorporate? - Practical Guides | UPGRADED |
| 54 | Trading Vehicle Assessor | UPGRADED |
| 55 | Use of Home as Office Calculator | |
| 56 | Use of Home for Business - 2013 Budget | |
| 57 | UTR Validator | |
| 58 | Visual Tax Planner | UPGRADED |

Interactive Tax Checklists

| | | |
|----|--|----------|
| 59 | Interactive Corporation Tax Checklist | UPGRADED |
| 60 | Interactive Income Tax Checklist | UPGRADED |
| 61 | Interactive PAYE Review Tool | UPGRADED |
| 62 | Interactive Pre Year End Meeting Checklist | UPGRADED |
| 63 | Interactive VAT Review Tool | UPGRADED |

continued overleaf

Tax Tips & Tools 2014/15 Edition continued

Payroll and Construction

Industry Scheme Tools

| | | |
|----|---|----------|
| 64 | Construction Industry Scheme Payment Sheets | UPGRADED |
| 65 | Employment Status Indicator | NEW |
| 66 | IR35 Deemed Salary Calculator | UPGRADED |
| 67 | Net to Gross Calculator | UPGRADED |
| 68 | PAYE Coding Notice Checker | UPGRADED |
| 69 | PAYE Penalties Calculator | UPGRADED |
| 70 | PAYE Settlement Calculator | UPGRADED |
| 71 | Payroll Calculator - Weekly / Monthly | UPGRADED |
| 72 | Payroll Checker - Annual | UPGRADED |
| 73 | Payslip | UPGRADED |
| 74 | RTI Penalties Calculator | NEW |
| 75 | Systemising Payroll - Engagement Letter | UPGRADED |
| 76 | Systemising Payroll - Payroll & CIS Costing | UPGRADED |
| 77 | Systemising the Payroll Function | UPGRADED |
| 78 | Year end PAYE Interactive PDF | UPGRADED |
| 79 | Year end PAYE Standard Letters | UPGRADED |

NI and Tax Credits Tools

| | | |
|----|------------------------------|----------|
| 80 | Class 4 NI Losses | UPGRADED |
| 81 | Maximum NI Calculator | UPGRADED |
| 82 | Pension Credits | UPGRADED |
| 83 | Tax Credits - Trading Losses | UPGRADED |
| 84 | Tax Credits 2013/14 | |
| 85 | Tax Credits 2014/15 | NEW |

Capital Gains Tax and SDLT Tools

| | | |
|----|------------------------------|----------|
| 86 | CGT Calculator | UPGRADED |
| 87 | CGT Indexation Calculator | |
| 88 | CGT Lease Premium Calculator | |
| 89 | Entrepreneurs Relief Tracker | UPGRADED |

Value Added Tax Tools

| | | |
|-----|---|----------|
| 90 | VAT Annual Scheme Calculator | |
| 91 | VAT Capital Goods Scheme | |
| 92 | VAT Cash Accounting Calculator | |
| 93 | VAT Ebay & Paypal Reconciliations | |
| 94 | VAT Flat Rate Scheme Calculator | UPGRADED |
| 95 | VAT Partial Exemption - Special | NEW |
| 96 | VAT Partial Exemption - Standard | NEW |
| 97 | VAT Registration Limits Tools | UPGRADED |
| 98 | VAT Registration Number Validator | |
| 99 | VAT Relief for Bad Debts | |
| 100 | VAT Relief for Bad Debts - Flat Rate Scheme | |
| 101 | VAT Scale Charges Calculator | UPGRADED |
| 102 | VAT Summary Working Papers | |

Administrative and Other Tools

| | | |
|-----|--|----------|
| 103 | Client Help Sheet System | UPGRADED |
| 104 | Interest on Tax Calculator | UPGRADED |
| 105 | Personal Tax Organiser | UPGRADED |
| 106 | Redundancy Calculator | UPGRADED |
| 107 | RTI Filing Trackers | |
| 108 | SA Payment Form | NEW |
| 109 | Small Business Rate Relief Calculator | |
| 110 | Student Loan Repayment Calculator | UPGRADED |
| 111 | Tax Department - Lead generation | |
| 112 | Tax Graphs | UPGRADED |
| 113 | Tax Liabilities (Graphical Summary) | UPGRADED |
| 114 | Tax Liabilities Sheet | UPGRADED |
| 115 | Tax Manager | UPGRADED |
| 116 | Tax Return Monitoring Submissions Report | |
| 117 | Tax Reviewer | UPGRADED |
| 118 | The 20+ Steps to Completing a Tax Return | UPGRADED |
| 119 | VAT Tracker | UPGRADED |
| 120 | Year on Year Tax Liabilities | UPGRADED |

Mind Maps

| | | |
|-----|-------------------------------|----------|
| 121 | Extracting Profit | UPGRADED |
| 122 | Higher Rate Tax Payer | UPGRADED |
| 123 | Tax Administration Procedures | UPGRADED |
| 124 | Tax Efficient Remuneration | UPGRADED |

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