

**Helping clients build wealth  
whilst being tax efficient**

**Optimise.**

27/07/2024

[www.optimiseaccountants.co.uk](http://www.optimiseaccountants.co.uk)

# How did you hear about us?



**An event**



**A person**  
*(by name)*



**Marketing material**  
*(where?)*

# What services are you looking for?



Self Assessment tax returns  
(UK or US or both)



Limited company tax returns  
(both UK or US or both)



Limited company set up



One off tax call



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One-off Tax Consultation  
or  
Limited Company Set up

# 60 Minute: Tax Consultation

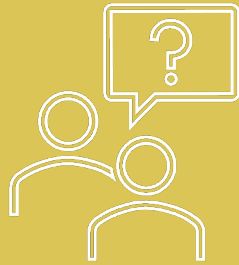


**International Tax Advisor**  
**Simon Misiewicz**  
EA, FCCA, ATT, MBA

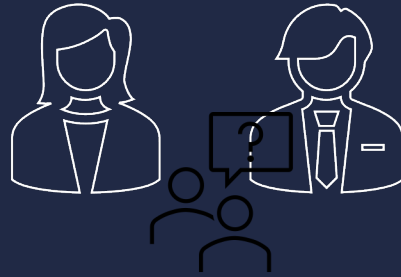


**UK Tax advisor**  
**Linette Coe**  
EA, ACCA, ATT,

# 60 Minute: Tax Consultation



**Upload questions  
& documents  
in advance**

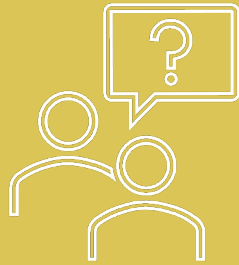


**Tax Consultation  
with Solution  
Filled Doc**



**Email support  
Post call Qs**

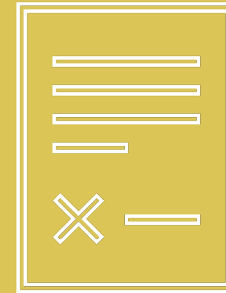
# Limited company set up



**Upload questions  
& documents  
in advance**



**Tax Consultation  
& Identify the  
right tax structure**



**Company set up  
(5 working days)**



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## **Monthly Retained Services**

Do you have an accountant? If so, **why are you leaving?**

What does **a great accountant** look like to you?



# Your income generating journey



Present Day

1-2 years time

5 years time



**Limited Company Accountants  
Managed by Simon Misiewicz**

FCCA, ATT, MBA, EA



**Self Assessment  
Louise Misiewicz**

BA Hons, MCIPS

**Ghania Ali**  
ACCA

**Linette Coe**  
ACCA, ATT,

**Daniel Gibbs**  
ACCA

**Sheba Rani**  
FCCA

**Victoria Hicks**  
Administration

**Michelle Worrall**  
Administration

**Muhammed Ahmed**  
ACCA, ATT

**You will be assigned an account manager to be your one point of contact for all tax matters (self assessments or limited companies)**

# Why choose us?



**Answers  
within 1 to 3  
working days**



**Qualified Staff  
(no part quals)**



**One point  
of contact**

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Where do you get your **tax questions** answered?

How **quick** do you get those **answers**?

# Accounts & tax

## What we do

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- ✓ Individuals (self assessment) tax return prep and filing
  - ✓ Limited Company tax return and accounts preparation and filing
  - ✓ Provide tax support when you want them
-

# Our approach tax returns





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Do you receive this **service** currently from  
your **existing accountant**?



UK Self Assessment tax work	
Self Assessment tax return	✓
HMRC agent & Tax investigation insurance	✓
Onboarding call	✓
30 minute Tax calls	✓
<b>Price for one person includes VAT</b>	£99.95 (pm)
<b>Price for a couple includes VAT</b>	£169.90 (pm)

£83.29 +VAT (£99.95) for 1<sup>st</sup> person without a limited company

£58.29 +VAT (£69.95 for 2<sup>nd</sup> person or if you also have our limited company services)

UK Limited company work	
Limited company accounts and tax returns (Companies House & HMRC) + Tax call	✓
HMRC agent & Tax investigation insurance	✓
Registered office & mail forwarding	✓
Annual confirmation statements & ATED reports	✓
60 minute onboarding call	✓
30 minute Unlimited Tax calls	✓
<b>Price per company includes VAT</b>	£83.29 + VAT PM £99.95 inc VAT PM
+ Registered office, ATED, Confirmation Statement	+£29.95 PM inc VAT

**Limited company clients:** Do you want to use our registered office or keep the address as yours on Companies House

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Do you need **US Tax returns** to be  
submitted to the **IRS**?



**US/UK Tax Advisor**  
**Simon Misiewicz**  
EA, FCCA, ATT, MBA



**US/UK Tax advisors**  
**Linette Coe**  
EA, ACCA, ATT,



HM Revenue  
& Customs



**Double Taxation**



**Tax Credits**



**Tax Returns**

**Timing IRS / HMRC**



**Currency Exchange**



**Tax Treatments**

# US Tax Return Services

## Who we help

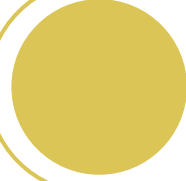


Americans living in the UK

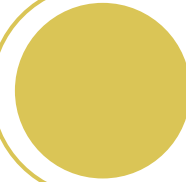


Brits that invest but do not live in the US

## Who we do not help



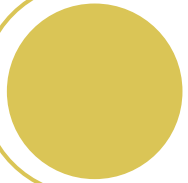
Brits that live in the United States



Anyone that requires **Forms 3520** (foreign trusts), **Form 8621** (PFICS: Passive Foreign Investment Company to be compelled)

# US Adhoc Tax Advice

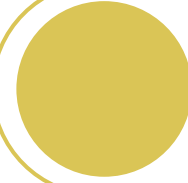
## Charged in US \$



\$499.95 ITIN application (US Tax ID)



\$499.95 One off 60-minute tax consultation

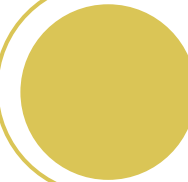


\$1,249.95 set up of LLC or C Corporation with a bank account. reg office & 60-minute tax consultation

## Charged in UK £



£1,499.95 one off 1120 tax return (company LLC or C Corp) with all sub forms + 60-minute tax review



£1,249.95 one off 1040 tax return (individual) filing with all sub forms + 60-minute tax review



US 1040 tax returns and sub forms	
1040 tax return includes all other forms + FBAR ( <u>Inc State tax</u> )	✓
IRS agent	✓
60-minute Onboarding call	✓
30 minute Tax calls	✓
<b>Price for 1040 IRS tax returns</b> (individuals and couples) , but you have <b>no US or UK limited company</b> and <b>no foreign investment accounts or pensions</b>	£99.95 (pm) inc VAT based in the UK \$129.95 (pm) based in the US
<b>Price for 1040 IRS tax returns</b> (individuals and couples) , but you have <b>US or UK limited company and/or foreign investment accounts or pensions</b>	£199.95 (pm) inc VAT based in the UK \$249.95 (pm) based in the US
USA & UK tax returns services	
UK self assessment – discounted from £129.95 per month	£69.95 / \$89.95 pm

US limited company corporation tax returns and sub forms	
1065/1120 tax return includes all other forms ( <u>Inc State tax</u> )	✓
IRS agent	✓
60-minute Onboarding call	✓
30 minute Tax calls	✓
<b>Price for US 1065/1120 tax returns for LLC, S Corps and C Corps</b>	£149.95 (pm) inc VAT based in the UK \$199.95 (pm) based in the US

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What questions about our services  
do you have?

# What happens next?



We take some details from you



We issue you an electronic proposal for signing



We send you a welcome email on you signing



You book your first tax call



**Limited company clients:** Do you want to use our registered office or keep the address as yours on Companies House

# What happens next?



**You**

Full name(s)

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Address

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Date(s) of birth