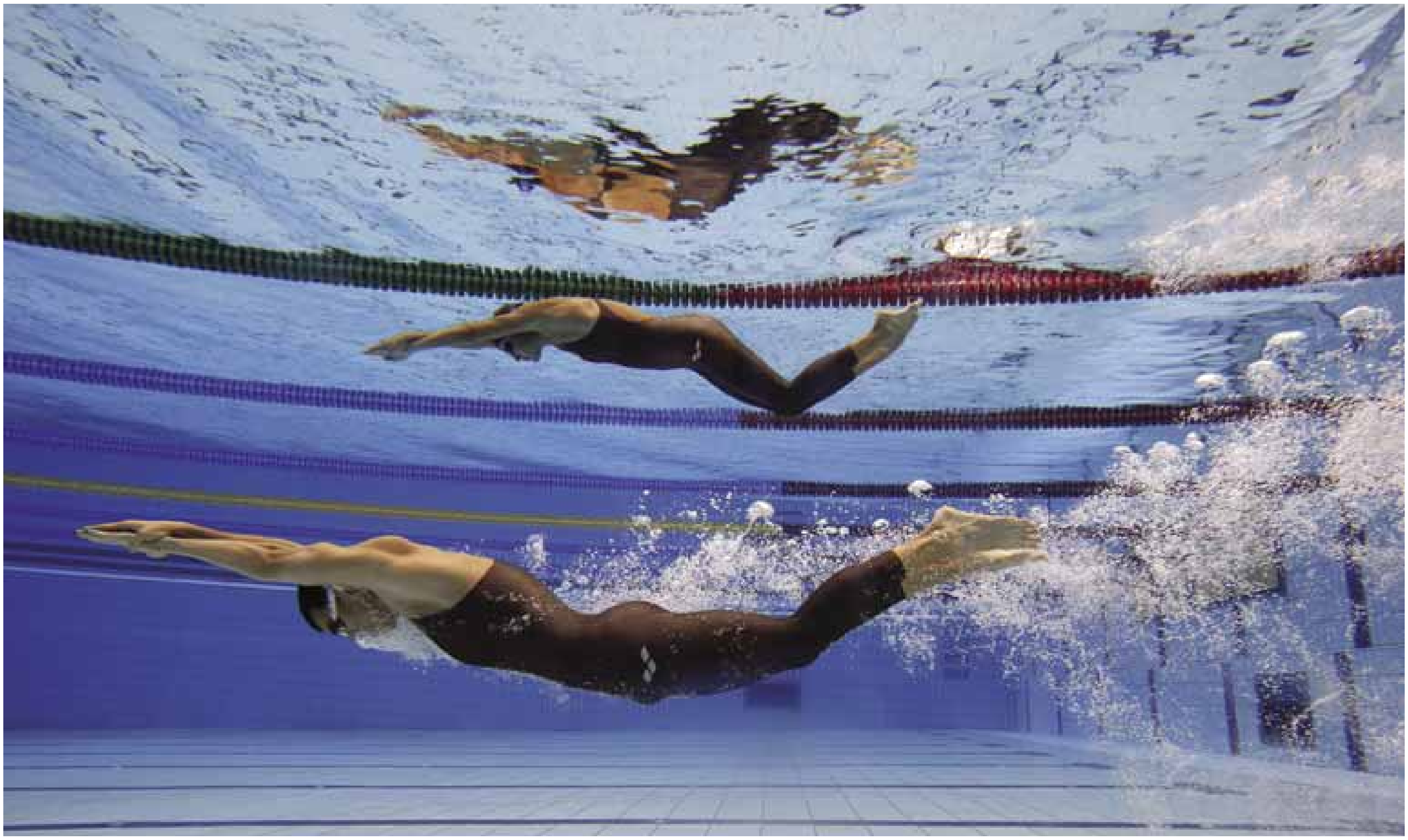
THE ANNUAL TECHNOLOGY SUPPLEMENT TO
TAXATION
MAY 2010



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TAXATION

ANNUAL TECHNOLOGY SUPPLEMENT

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Website www.taxation.co.uk

Annual subscription: £319;
2 year discounted subscription £570
Overseas subscription rates:
Surface £429; Airmail £439
For further subscription details
please contact Customer Services on:
tel: 0845 370 1234 or fax: 02890 344212

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Printed by The Manson Group, St Albans, Herts AL3 6PZ. This product comes from sustainable forest sources.

TECHNOLOGY RULES

Welcome to the 2010 *Taxation* technology supplement. This supplement contains a range of information about a wide variety of software applications, from basic self-assessment tax return packages to online information to P11D packages, which it is hoped will prove useful if and when readers are looking to buy or replace software.

In terms of who's who, the main change in the last year has been Thomson Reuters' acquisition of the Abacus business from Deloitte, otherwise the market has been relatively quiet.

The future is online

The move to dealing with tax matters electronically is seemingly unstoppable. Virtually all employers must now file their PAYE end of year returns online, paper VAT returns are being phased out, and from 1 April 2011, HMRC will not accept paper company tax returns for accounting periods ending after 31 March 2010. Every year the number of income tax self assessment returns submitted electronically increases, with 6,429,899 2008/09 returns filed online by the 31 January deadline. It is impossible to ignore and most acknowledge that, when everything works smoothly, and increasingly HMRC's systems do seem to work efficiently, managing tax returns online is simple and quick.

Another development is iXBRL: businesses will also have to tag tax computations and statutory financial accounts using iXBRL from April 2011. This is something else that software providers of corporation tax and accounts packages are having to address. An up-to-date list of providers who are geared up for iXBRL can be found on HMRC's website at www.hmrc.gov.uk/efiling/ctsoft_dev.htm.

Starting point

The reviews in the supplement include contact details for each product, along with an independent report on what each package does. The intention is to give readers a starting point, rather than a total rundown of its functionality.

While great care has been taken to ensure that the reports of each product are as accurate and up to date as possible, potential buyers should always contact the software provider for further information and, where possible, test the product before buying. It is also worth finding out what existing users think of the software. For example, are updates supplied on time, is the support effective and timely, is the software easy to use? The software providers will usually supply names of existing users if requested.

There is an abundant supply of self-assessment software providers, most of whom are very well established. However, before investing in a product, it is important to know what you want from the software and how much money you are prepared to pay for it. A comprehensive self-assessment package which produces all the return forms, supplementary pages, computations and with lots of administration and planning features is expensive and may provide more features than many smaller practitioners would like. While the larger suppliers, eg CCH, IRIS, Sage, and Thomson Reuters offer scaled-down versions of their products, there are many smaller providers, for example, Andica, BTCSoftware, Forbes, Keytime, and QMS whose packages are comprehensive, but because they offer less in terms of planning and reporting features are more attractively priced for small firms.

Worth the trouble

Finding the right product will be time consuming, but it is worth doing the research to ensure that you end up with the software that suits your needs both now and in the future.

CONTENTS

Compiled by Allison Plager
Front cover sponsor Digita

The future is just a series of nows

Tax is more than just compliance. PAUL DUFFIELD explains how the profession can use technology to increase the services they offer clients.

The last few years have been challenging for tax professionals and many have shifted the focus from compliance services to providing decision making support to clients in a bid to improve the bottom line.

Emerging from a global recession, the current challenges are in the main part economic, with cost reduction a key objective. Technological developments have changed the way in which we all do business and during the next ten years, that pace of change is likely to accelerate but will these developments help to save time, effort and money? The answer is a definite yes and in the following article we aim to explain how.

Speeding up the process

This is one of the most exciting times the tax profession has ever witnessed and new developments, no longer constrained by space or time, are set to accelerate change. One new application creating a high level of excitement in the market is being hailed as generating the most significant productivity innovation in personal tax compliance since on-screen tax forms were pioneered over a decade ago.

The system allows the import of electronic data, from a payroll application for example, directly into the tax system without any re-keying of data. It also allows for clients to enter their own data directly into Excel workbooks, which is transferred seamlessly to the personal tax software. Because the data is being transferred from system to system without human intervention, the risk of error is reduced and it is estimated that the time taken to gather client data will be reduced by as much as 90%.

The immediate benefit for practices is that they are able to use non-qualified staff in the collation process at a lower hourly cost allowing qualified staff to concentrate on consultancy services that attract higher fees.

Data capture

The use of technology to make the compliance process faster and more efficient is already gaining momentum in some of the more innovative UK practices. Currently, tax professionals receive completed questionnaires from their clients along with their forms such as P11Ds, P60s and P45s and they are then faced with having to capture that data and enter into the practice software.

This process necessitates the manual entry of data and by its very nature, is time consuming. Greater efficiency can be achieved by capturing the data into the system without manual keying through the use of image processors that sift and sort the images and intelligently extract the information and enter it directly into the practice software. It is anticipated that some accountants will invest in the technology to capture data in this way and some will outsource the process to specialists serving the profession.

One practice is already using image processors in its own tax practice and returning massive efficiency gains. The compliance

KEY POINTS

- Electronic transfer of client information.
- Reduced keying in of data.
- The rise of the paperless office.
- Purpose of iXBRL.

process is completed quickly and efficiently with 90% of returns completed by the end of October. Technology automates the entire process from data capture to the completion of the returns at their centre in Mumbai, to the paperless review in the UK and finally to the electronic filing of the returns to HMRC.

Document management

The paperless office has long been talked about and some practices have invested heavily in big enterprise systems that are expensive to manage and necessitate hundreds of hours of consultancy to bring them into line. The result is that many of these are now sitting idle and just not being used.

The good news is that the latest digital document management systems now integrate neatly into the tax professional's specialist environment. It makes no sense from a cost point of view to store documents manually, especially when archiving and retrieving costs are added to the equation. The reality is that documents can be filed directly from within the tax program and to complete the circle, these same client facing documents can be published automatically providing a complete end to end web based service to those clients that want it.

Electronic communication

Communicating and interacting electronically with clients also helps to keep costs down and helps to differentiate the practice from the fixed price bucket shop. The heightened security provided by client portals, suits the tax environment perfectly allowing documents such as completed tax returns and other confidential documents to be placed in the client's own secure area on the practice's own website. Clients can then enter their tax compliance data directly which is then 'pushed' straight into the practice's personal tax database.

Sceptics may make the point that automation to this extent may provide the potential for more risk but again the software developers are tackling this in innovative ways. A new application designed specifically for the tax professional to review the electronically completed tax return to ensure that is both complete and accurate is said to save half an hour per client on each review undertaken. The tool works by drawing the accountant's attention to any unusual variances between years and issues a warning if a variance exceeds the pre-set level of tolerance. A full information trail is provided with a log of all events during the tax year and there is access to notes made by other staff involved in the review process. A flag system is used to create alerts and it is easy to establish an enquiry with the client and then to track it with the system. The system can be used for personal tax clients, partnerships and trusts.

iXBRL

Looking at the immediate future, there appears to be some nervousness about the next set of changes to hit tax professionals: the introduction of XBRL as the new compliance regime.

XBRL is a language for the electronic communication of financial and other business data that is designed to provide better access to information. It facilitates analysis, transparency, timeliness, and dissemination of information for better decision making through the tagging of data. In practice it means that the viewer sees what the author intended in terms of content and layout, but can sift and sort specific data to meet their requirements.

Software developers are working on corporation tax programs that will allow tax practitioners to automatically convert computations into iXBRL for online filling and on developments to accounts production systems that generate an iXBRL version of the required accounts information.

Tax professionals should check with their software supplier to see what their plans are for iXBRL as some platforms are reaching the end of their natural road and a few seem to be using the introduction of the new regime as an excuse to raise prices.

The key questions to be asking are 'Does the iXBRL functionality work intuitively with the product?' and' Is it reliable?'.

Tax and practice management

To conclude, tax software does not stand in isolation. For real efficiencies to be made there needs to be an integrated solution comprising tax and practice management systems.

Dashboards are expected to become more common place and will be utilised so that all members of the team can access task lists and evaluate the progress of individual jobs, using them to advantage to spot issues before they become a problem. Trackers can manage specific and ad hoc jobs with the ability to assign stages so they can be reported on.

Data will increasingly be passed to compliance applications electronically, whether for accounts or tax compliance, reducing the need for paper. Data can be transferred automatically from book keeping packages to the accountant for final adjustments and preparation as well as for tax purposes. HMRC's demand for iXBRL has only accelerated that process and it will be advantageous and time efficient for the tax professional to conform to the standards as deviation will only add extra time to the task.

The extra tagging of iXBRL will allow for better analysis by HMRC and by tax professionals themselves and it is expected that benchmarking will become more attractive because standards will be universal.

Conclusion

The economic turmoil continues to leave its mark, and those who are surviving are doing so because of their ability to change their ways, become more efficient, or streamline operations and business practices. It is the informed tax practices that use technology developments to their advantage that will be in the best position to control their destinies.

New products and technologies are attractive investments because they can help reduce operating costs; a critical advantage in the global business environment. It's not just the cost benefits that are so persuasive, new applications such as an annual review tool also help to avoid risk by checking the data and providing alerts if any variance is greater than anticipated.

As Charles Darwin put it, 'It's not the strongest not most intelligent of the species that survive; it is the one most adaptable to change'.

Paul Duffield is product manager – tax at Digita, Thomson Reuters. He can be contacted on e-mail paul.duffield@thomsonreuters.com.

Personal tax

The many software packages which deal with personal taxes vary widely in functionality and scope, as the following reviews show.

taxcalc®
professional tax made clear

Acorah Software Products (TaxCalc)

TaxCalc began more than 25 years ago as a software package produced by Which?, aimed at individuals to help them complete their personal tax returns. A professional version followed. The software was acquired by Acorah in 2005. The firm is a Microsoft certified partner.

TaxCalc Pro is the professional version of the software allowing an unlimited number of clients. It deals with both the personal and partnership tax (SA800) returns, together with all the supplementary pages, including Lloyd's underwriters, MPs and ministers of religion. Data is entered using a 'SimpleStep' interview format, or directly onto the return forms. Navigator panels allow data entry via a series of pick-lists. It has a company car tax calculator and deals with foreign tax credit relief calculations. Online filing is included free of charge.

A tax summary shows the taxpayer's total liability, and additional pages provide a complete breakdown of how the figures are reached and the payments on account. Form SA303 for reducing payments on account can also be produced. The package deals with capital gains tax computations and some 'what if' planning, although not with pension or change of accounting date planning. Data is carried forward year on year. Returns can be filed using the online filing service and online filing of forms 64-8 can also be carried out. The software has data mining capability, a checklist to collect client data, an abbreviated return to check data entered, a comparison of current and previous year data showing absolute and percentage variations in the data, detailed schedules of tax return information, and password protection. Interactive pdf claim forms (HS302 and HS304) can be automatically attached to the online filing where required.

Other useful features enable the user to copy entries for jointly held investments and capital gains to a partner's file and to transmit an anonymous version of the tax file directly to TaxCalc support.

TaxCalc Pro is an effective, popular, easy-to-use self assessment software program and has in excess of 4,000 users, most of whom are one, two or three partner firms. It is competitively priced, aimed principally at small to medium sized firms, non-tax professionals, tax shops, etc, although current users also include large institutions and banks.

A dividend database made of 1000 FTSE and AIM listed shares is also available.

TaxCalc Trusts deals with all the SA900 forms, tax calculation and online filing.

The software comes with a free pdf manual, online help screens and customer support with the ability to make anonymous and e-mail client data for support purposes. There is a customer website, occasional e-mail bulletin service and newsletters, online knowledge base and product review groups. Updates are provided by an automatic TaxCalc live update, and an evaluation copy can be downloaded from the website.

TaxCalc won best tax software in the AccountingWeb's Software Satisfaction Awards 2008 and 2009.

Contact	Sales
Address	Acorah Software Products, 4 King Street Lane, Wokingham, Berkshire RG41 5AS
Tel	0845 5190 882
Internet	www.taxcalc.com
Cost	TaxCalc Pro – £300; TaxCalc Pro Suite – £400; TaxCalc Trusts – £110
Rec spec	Windows XP; Pentium 4; 256mb RAM; 100mb hard disk space

Advanced Professional Solutions Ltd

Founded in 1991, Advanced Professional Solutions (APS) practice management solution, Advance, can be linked to other SQL based software solutions using Advance Fusion. The tax systems that can be linked include, Digita's Personal Tax and Corporation Tax, CCH Software's Personal Tax and CGT, and Tax Computer System Ltd's AlphaTax.

Advance is a powerful practice management system with functionality that includes timesheet and expense processing, work in progress management, workflow, billing, client relationship management, document and e-mail management. Advance was the first practice management solution to be accredited by the ICAEW and is the current holder of the Accountancy Age Practice Management Software of the Year.

APS has many well-known organisations among its clients. These include Mazars, Menzies, Saffery Champness, Armstrong Watson, Hazlewoods, Princecroft Willis, Goodman Jones, Chiene & Tait, McKenzies, Simpkins Edwards, Horsfield Smith, Day Smith Hunter, Bulley Davey,

Contact	Tim Bennett
Address	22 City Road, London, EC1Y 2AJ
Tel	0207 246 9990
E-mail	timb@aps-advance.com
Internet	www.aps-advance.com
Cost	price on application
Rec spec	Windows XP Professional; 512mb RAM; 100mb hard disk space, SQL Server 2005

Andica Ltd

Andica Ltd is a specialist developer of business accounting software and has been producing its self assessment tax return product for five years. The software is designed to be straightforward to use and allow users to get started pretty much immediately after activating it.

The Self Assessment Software (SA100) produces all the supplementary pages, MPs and form R40 apart. Data is entered using a wizard-style entry screen and the main entry forms are designed to look similar to the HMRC forms. There is an option to add multiple forms where necessary, eg if a client has more than one employer. The computation is produced automatically, with payments on account calculated. The HMRC notes and help sheets are available, as is context sensitive help. Data can be carried forward year on year and the information can be password protected. The aim of this software is to manage and submit the tax return, so there are no planning features. A records list provides an 'at a glance' overview of the state of the practice's returns and a data entry progress bar at the bottom of the screen shows the user how much of the return has been completed. Online filing is included. Forms can be saved or exported to pdf format if wished.

Andica also offers SA800 Partnership Software and SA900 Trust & Estate Software.

Software prices are highly competitive and are based on client bands so that users pay for the product and number of clients required. A manual is provided with the software and training can be provided at extra cost. In addition there are online help screens, telephone hotlines, a customer website, newsletters and e-mail bulletin service. Potential purchasers can view a short demonstration on the website. The software is provided online or on CD-ROM.

Contact	Sales
Address	Andica Ltd, 24 Doncaster Drive, Northolt, Middlesex UB5 4AY
Tel	0845 643 6500
Internet	www.andica.com
Cost	Self Assessment Software (SA100) from £12.95 plus VAT; SA800 Partnership Software from £14.95 plus VAT; SA900 Trust & Estate Software £19.95 plus VAT; Payroll from £69 plus VAT
Rec spec	Windows XP, Vista and Windows 7; 2gb RAM; 200mb hard disk space

BTCSoftware

BTCSoftware is a specialist, independent business that began producing corporation tax software nine years ago (see report in the Corporation tax section). Much more recently, in 2009, the company launched a self assessment product, SA Solution, aimed at small to medium sized multi-partner practices and sole practitioners.

SA Solution is a comprehensive program which deals with most aspects of self assessment and offers unlimited individual tax returns, partnership tax returns and trust tax returns. All the supplementary pages, other than those for MPs, are offered. All tax return data is retained and can be automatically drawn across each year; new data is entered via a menu system. The software does its own version of the tax calculation using the HMRC's fixed rules and is available for review. With regard to capital gains, the user enters the details of each transaction and then the software makes the calculation, coping with part disposals and losses brought forward; there is an integrated FTSE350 dividend database. While the planning aspects of the software are limited, eg pension planning and change of accounting year end planning are not catered for, the software does handle automatic computation of foreign tax credit relief, calculation of payments on account, excluded income rules, top slicing relief for chargeable event gains, forms SA303, and student loan repayments.

The software is customisable and easy to use. Clients can be linked as required. Information is brought in from elsewhere, eg information is imported to the SA return from the partnership return and a warning system alerts the user in case there are any discrepancies. Returns are lockable to avoid accidental changes. Information can also be imported from SAGE and VT Software Final Accounts.

Online filing comes as standard and BTCSoftware is an HMRC filing partner. PDF files can be attached to returns.

SA Solution Express is a lower cost, limited version of the main product, including the same functionality, aimed at advisers who have a limited number of self assessment returns, and a few partnership or trust returns. It handles up to 25 individual tax returns, 5 partnership tax returns and 1 trust tax return and can be upgraded to the full product if desired.

An online manual is included. No training is required on the basis that the software is so intuitive, however, remote access technical support is available. Support comes in the guise of online help screens, telephone hotlines, customer website, online knowledge base, e-mail bulletin service and newsletters.

SA Solution is a reasonably priced package which is easy to use, overall representing good value to practices.

BTCSoftware is now focusing on the development of the integral practice management core within SA Solution. This will control all client data, filing activity, task management and related communications (including mail merge) for individual, trust, partnership and corporation tax returns (when linked to either CT Solution). It will be available as an option for the 2010 release in June for an additional cost of £95.

Contact	Andrew Ross
Address	BTCSoftware, Lyndale House, 24 High Street, Addlestone, KT15 1TN
Tel	0800 612 7650 or 01932 840572
Internet	www.btcsoftware.co.uk
Cost	SA Solution – £375 plus VAT; SA Solution Express – £195 plus VAT; P11D – from £150
Rec spec	Windows XP, Vista or 7; 512mb RAM; 1.5gb hard disk space

CCH
a Wolters Kluwer business

CCH

CCH Software is a subsidiary of the publishing company Wolters Kluwer (UK) Ltd. It has been producing tax and accountancy software for over 25 years and provides software to some 2,000 accountancy and tax related firms. Since the acquisition of MYOB's UK and Ireland Accountants Division in April 2008 by Wolters Kluwer, CCH's key focus has been to build on its integrated suite of tax and accounting products. CCH have reviewed its wide range of products and have developed a product roadmap which aims to deliver .net technology and comprehensive functionality to suit the needs of all its customers. 2009 saw a major migration of CCH's users from the old style technology to its new technology product, CCH Personal Tax.

CCH's software suite is called ProSystem and is an integrated suite of compliance and practice management products. The CCH ProSystem Suite allows everyone in the practice to find, use and enter the information they need through one place, CCH Central. CCH Central plays a core role by providing not only a single client facing user interface but also access to the single database and cross suite functionality. It allows individuals within the practice to personalise their working environment through 'home pages' displaying the information real-time that is relevant to them. It also allows users to interrogate and extract the valuable data that the practice holds, putting it to good use. It relieves the practice of having to enter data into various different places and, with one common user interface, makes training and using the products much easier.

The CCH ProSystem suite includes: Personal Tax, Corporation Tax, Partnership Tax, Trust Tax, Practice Management, Accounts Production, Document Management, Scan Management, Audit Automation, Trust Accounts, Insolvency and Strategic Planning.

The software is backed by CCH Central, which is effectively a personalised desktop, offering the user complete integration. It is a central database for shared data, security, reporting and home pages for users to create views of the data most suitable to them, eg tax return status summary, graphical views of percentage of returns filed by portfolio/staff, tasks awaiting approval. Users who prefer to mix and match their tax and accounting software can reap the benefits of the integration provided by CCH Data Factory (formerly Tax Factory) as it also works with third party applications, thus removing the need to rekey data. CCH Data Factory allows seamless data transfer to and from CCH Personal Tax while retaining the security and validations which exist at the standard user interface.

Personal Tax offers a comprehensive personal tax system handling pretty much all aspects of self assessment. It produces all the standard self-assessment forms, including MPs, and two styles of tax computation. Information is entered by drilling down to underlying data entry screens, via the tax return or the computation, or through a data entry menu system, with the information automatically being carried through to the tax return. The tax liability is calculated automatically updating in real time along with the statements of account, payments due etc.

Information can be transferred in from any accounting system which can provide a simple text file in the required format. In addition, CCH is a reseller of PKF P11D Software which allows users to draw P11D details into Personal Tax automatically. (See under Employment packages for information on PFK P11D Software.)

CCH Partnership Tax produces facsimile SA800 and supplementary pages, using the information from the Central database. It deals with multiple accounting periods within the tax basis period and data can be imported from external sources, such as a trial balance. The information integrates fully with Personal Tax so that the individual partner's allocation of income is included in the partnership pages of the personal return. Individual partnership statements can also be printed from the system for the partners.

The business tax module is completely integrated with self employment so that the basis period information along with capital allowances etc. are calculated from the creation of the accounting period. This comprehensive system deals with various aspects of self employment including the change of accounting date rules, overlap relief, capital allowances, asset movements, and farmers' averaging.

Personal Tax users also receive as part of the package an error and exception real-time report which is available on screen alongside the data entry menu and the computation. The tax return is reviewed automatically, uncovering mistakes made during the preparation of the return, or any changes made since the previous return. This means that problems can be sorted out before the return is submitted to HMRC, reducing the likelihood of an enquiry or rejection at the government gateway. CCH is a great supporter of online filing, and this function is incorporated in the software along with batch processing to reduce administration time. The Filing by Internet module provides efficiencies such as automated schedule attachment for Capital Gains and also pdf creation for client review.

The database is user-definable, which allows, say particular groups of clients to be grouped together. This is useful for both administration and marketing purposes. Taking the marketing aspect a few steps further, CCH Tax Explorer is an optional module which integrates into Personal Tax. It is a data warehousing tool, allowing users to make queries and produce reports on personal tax data. It has a drag and drop facility so that the user can easily drill down into data to ask specific questions such as 'which clients are coming up to retirement but do not have a pension?' The reports can be imported into Excel, csv, rich text, etc. so that the user can manipulate the information as required. This useful tool is easy to use, and can help the user manage risk in the practice.

The software runs under the database platform Microsoft SQL, which is likely to be of most use to larger firms, and under MSDE (free from Microsoft) which may be more suited to smaller practices.

The Aide Mémoire module is an intelligent mail merge facility which users can send to clients in order to obtain tax return information. It produces questionnaires or standard letters using Microsoft Word templates, which can be customised as the user wishes. The letters produced can be posted or e-mailed to clients.

An automated workflow module is also available for compliance procedures such as tax return completion, money laundering regulations and client engagement. The workflow system integrates exceptions, filing validations and review procedures and allows automation via default triggers built into the software such as 'start tax return when tax year created'. It allows the firm to set up its own procedures and automate the steps. Each user is updated with his next task on his homepage.

Capital gains tax calculations are performed by the CGT and Dividend Scheduling module which automates the preparation of investment income and capital gains schedules, taking into account dividend payments, scrip issues, reorganisations, mergers, take-overs and demergers. The income schedules produced by this module can be used to support the return as can the comprehensive capital gains tax calculation submission. A particularly useful planning feature is the dummy sales function that allows users to illustrate a client's potential capital gains tax position if a holding is sold on a given day. All existing and previous capital gains tax legislation is included and used automatically in the computation. A comprehensive securities database is included free of charge which is maintained and updated by CCH. Users can download up-to-date information by visiting the CCH website, on a daily basis if required. The modular pricing and flexible usage options make the module suitable for any size of practice.

CCH Trust Tax deals with the administration of trusts and estates, calculating the tax liability of the trust or estate and printing a facsimile SA900 return. It is linked to the Trust Accounts package for completion of the return and there is also an R185 package which

provides the necessary calculations and compliance returns for beneficiaries.

The Data Factory allows data to be imported from any application via XML as well as sharing data from the tax application into any other application. This integration means that client, tax and task information can be entered directly to or exported from Personal Tax. This can be useful if a practice wants to create a client portal and publish tax information such as tax payment reminders or the progress of the tax return. The integration is not limited to CCH software, so users will find the integration works with other branded software.

Two new modules have been introduced: Return Review and Expatriate Tax. Return Review builds on CCH Return Analysis which is now fully integrated in CCH Personal Tax allowing the automation of the tax return review process. This allows direct access from the report to the data entry screens and the viewing of notes entered during the data entry process allowing the reviewer to have all the information they require. Review notes added are user and date stamped to create an audit trial and in built automation allows the case progression to be updated automatically when the review is signed off.

Expatriate Tax brings specialist functionality from CCH Taxpoint into CCH Personal Tax. The module undertakes the specialist gross up calculations on a real time basis under differing scenarios down to an item by item basis. Employer templates hold the equalisation policy for the employer which filter through to the employee record ensuring the correct calculations take place, including exchange rate calculations, but with the flexibility of being altered to meet specific employee circumstances. Multiple employments with differing equalisation policies can be catered for and full supporting schedules are provided.

CCH Practice Management also sits within the central database. This provides all the tools a practice needs to run efficiently such as time and fees, billing, job management and resourcing but also provides cross application tools such as reporting and workflow. CCH Document Management is a document scanning, filing and management system, which also saves and stores e-mails sent to and received from clients, and is fully integrated in CCH Central.

CCH Scan Management is an intelligent scanning module that automatically catalogues tax documents into a single pdf file saving the user time in sorting the documents themselves. It also presents the information in the same order as the tax return helping to speed up the data entry process.

The program is supplied on CD and online. The main release is provided on a CD which includes the main installation as well as all supporting product release, support and training resources. Updates are supplied online.

A vast array of support is available, with products having in-built help. In addition, training is provided, as are online help screens, a help desk, website with extensive support information and facilities, customer user groups, newsletters, seminar programmes, product review groups, focus groups and annual client days. Training on the new CCH Personal Tax software will be available free of charge for existing clients to ensure they are up and running as soon as possible. This training is available as e-learning which clients can download from the website, alternatively clients can request onsite or classroom training.

The software is fully scalable and can be used by any size firm.

Contact	Sales administration
Address	145 London Road, Kingston Upon Thames, Surrey KT2 6SR
Tel	0844 561 8181 **Fax** 020 8547 2638
E-mail	cchsoftware@wolterskluwer.co.uk
Internet	www.cch.co.uk/softwareproducts
Cost	prices on application
Rec spec	Windows XP Pro SP2, 2Gb RAM, 15Gb hard disk space

Drummohr Technology Ltd

Drummohr Technology has been producing cost effective and highly regarded tax software for 16 years. Having been acquired by IRIS in 2008, it not only has a dedicated development team but also by being part of the IRIS Software Group it also has access to a larger pool of expertise and resources.

Tax Assistant, Drummohr's comprehensive self assessment package, comprises an integrated suite of linked modules covering all aspects of self assessment. Used by over 1,400 firms, it can stand alone or can be networked.

The Tax Return module covers all self assessment tax years. Most supplementary pages are catered for, including Lloyd's underwriters and ministers of religion, but not MPs. Data is entered using the on-screen tax return. The user can put additional information on notepad pages using context sensitive notepad icons, and this information is printed in the form of supporting schedules.

Several calculators are available, including capital allowances, business tax adjustments, car benefits, and capital gains. Data can be imported from most accounts production software packages. The user can print an information request for each client for the next year's return, and the return can be printed in summary form.

The tax calculation is done automatically following the HMRC's calculation, with a summary version also available. The calculation deals with lump sum payments, chargeable event gains, top slicing relief and the non-resident's exemption. It calculates the payments due on account, as well as the form SA303 for reducing those payments. An estimate of the following tax year's calculation can also be provided.

The database management system, TaxBase is fully compatible with Microsoft Access, and holds the tax related information for all clients, e.g. names, business and employment details, and pension contributions. An internal tax administration record is created for each client, and a diary feature lists various events for up to four years. Users can use the system to filter lists of clients according to user defined criteria. Other administration features include a register of tax office addresses, a dividend database of company dividends which can be edited by the user, mail merges, and the generation of standard letters. Forms 64-8 can also be produced.

Other modules include the Trust and Estate Tax Return, the Partnership Return and the Repayment Claim, which deals with the R40 form. All are similar to the Tax Return module, and can be used either in conjunction with TaxBase or on a standalone basis. Reports are displayed on screen, can be printed, and can be saved as a pdf document for e-mailing to the client. Tax Assistant will also produce the short CT600 company tax return for printing and paper filing.

The Company Tax Return module, which is iXBRL compliant, produces the corporation tax return CT600 and automatically calculates corporation tax liability, marginal relief and tax due on non-corporate distributions, based on the entries made on the on-screen CT600 form.

The module also offers the supplementary pages and other features, for example, trading computations, capital allowances, loan relationships, taxed income, overseas income, property income, enhanced research and development expenditure and capital gains. There is also a facility to include a section of additional information in free text form to accompany the schedules.

Online filing is fully supported across all modules.

Forms P11D and P11D(b) are produced using Company Tax Return. All benefits are calculated and data from this module integrates with the employment supplement in the Tax Return module.

A online manual is supplied together with a telephone helpline, customer website and e-mail bulletin service. Training can be provided at extra cost. The software is supplied online or CD-ROM by request. Updates of the program can be downloaded from Drummohr's website. An evaluation kit is available, free of charge, for users who wish to examine the software in depth.

Contact Sales
Address Drummohr Technology Ltd, Riding Court House, Riding Court Road, Datchet, Berks SL3 9JT
Tel 0844 815 5544
Internet www.drummohr.com
Cost Tax Assistant: from £530 plus VAT; Corporation Tax: £477 plus VAT; Trust Tax: £477 plus VAT
Rec spec Windows XP, Vista or 7; 1Gb RAM; 5Gb hard disk space

Financial Software Ltd

Financial Software Ltd is a specialist software house that has been operating in the UK for 15 years. It undertook the design, development and marketing of a capital gains tax and income tax solution called CGiX, which automates capital gains tax calculations on investment portfolios and provides income reporting. It uses an SQL Server 2008.

CGiX contains capital gains tax legislation from 1965 and holds corporate event data for all UK listed companies since early 1982. Financial Software receives data from four different data vendors and can provide a global corporate event service. CGiX corporate event transaction types cover more than 100 capital gains tax specific definitions of corporate events.

The product integrates with standard investment management systems through a configurable interface, thus allowing the investment management system to use the database to calculate and format reports and what-if scenarios. Other key features include:

- capital event history for UK unit trusts, open-ended investment companies, off-shore funds and hedge funds with extensive coverage of equalisations;
- broad coverage of international capital events;
- dividend and income processing and reporting;
- historic dividends for UK quoted securities since 2004 and broad coverage of international dividends;
- processing and capital gains tax reporting of traded options and other forms of linked and fungible securities;
- legislation database containing rules and definitions for UK capital gains tax and income tax relevant to individuals, companies and life companies with chronological context;
- UK rebasing rules, indexation and taper relief including election of March 1982 and 1965 values;
- take-on positions for pooling including adjustment of costs and indexation allowance for rights taken up within 1982/85 pool;
- transfer and relief processing such as inter-account transfers, probate, employee shares schemes, gifts, gain deferrals, venture capital trusts;
- short sales;
- loss allocation to external gains, gains to external losses and losses carried forward;
- rules and definitions for Australian capital gains tax and income;
- rules and definitions for US capital gains;
- account aggregation and shared account processing for trusts;
- UK HMRC formatted capital gains tax reports in addition to an extensive reporting pack that includes backdated portfolio valuation, capital gains, income and calculation audit reports;
- detailed audit trails;
- multi-currency functionality;
- thin client browser-based solution with relational database technology and application server architecture;
- system segregation within a single database for multiple companies;
- single sign-on security for imbedding within host applications;
- MSMQ messaging;
- WSDL web services.

CGiX Australia contains the rules and definitions for calculating capital gains and income with respect to Australian tax rules. It also includes a corresponding Australian reporting pack that includes specific detail, such as cost basis methods and managed fund distributed capital gains, as required for Australian tax reporting.

Financial Software is a Microsoft certified partner.

The program is available on CD-ROM or can be downloaded from the website. Evaluation copies and updates are also available from the website. In terms of support, a whole range of help is offered, including a manual, training, online help screens, helpdesk and customer website.

Contact Imran Khan
Address Financial Software Ltd, 6th Floor, Windsor House, 39 King St, London EC2V 8DQ
Tel 020 7776 9850 **Fax** 020 7600 9117
E-mail imran.khan@financialsoftware.co.uk
Internet www.financialsoftware.co.uk
Cost price on application
Rec spec Windows, Pentium II 266 or higher, 1mb RAM, 5mb hard disk space

Forbes Computer Systems

Forbes Computer Systems has been producing the competitively priced self assessment software, ProTax since 1992. An innovative independent company, it is a registered Microsoft partner and a member of the Microsoft Empower ISV program.

ProTax is used by some 1,250 firms. It allows an unlimited number of clients, and is available in modules which can be bought individually or as a complete suite. The software covers personal tax, trusts, partnerships and corporation tax. Virtually all aspects of self assessment are handled including Lloyd's underwriters, ministers of religion, MPs, R40 repayment claims, pension planning, other 'what if' planning, form SA303 for reducing payments on account, form SA800 partnerships and form SA700 non resident landlords. The forms, backing schedules, payments on account and a complete tax liability calculation are all produced. Data is entered directly on to the tax return forms or via a step-by-step wizard. As the user completes the return, the information is constantly being checked against hundreds of validation rules guaranteeing the integrity of the data. Much of the data can be drawn from the Client Database module, which flows automatically into the rest of the system. Accounts details can be imported from Forbes Accounts, the company's accounts production system, as well from many other external accounts providers. A comprehensive dividend database is available at a small additional cost. A range of standard letters and reports can also be produced, along with an information request questionnaire, which can be sent to clients. On screen 'sticky notes' can be used to flag up queries.

The company is directly involved in the development of new technology and has embraced electronic filing wholeheartedly from the days of the electronic lodgement service. Online filing is included and pdf files can be attached to SA100s, 800s and 900s. Forbes has recognition for agent authorisation online.

Forbes Accounts is a comprehensive final accounts production system for sole traders, partnerships and limited companies. Trial balances can be created instantly and the software automatically updates the data on partnership, self-employed and corporation tax returns.

The software is intuitive and easy to use. Cross product compatibility and integration has further enhanced this. Other modules include: CoSec, a company secretarial package that includes electronic filing; ProTax Planner, a planner for Schedule D cases, Tempus time recording software, ProTax P11D for expenses and benefits, Payroll and ProTax CT which produces the new short and long corporation tax return forms and performs all necessary computations (see review in corporation tax section).

CISassist deals with the construction industry scheme, e.g. it handles monthly payments to subcontractors, electronic processing of verification numbers, and can be used by bureau services and in house. It comprises three modules: CISbase is a proprietary database and management system for keeping track of payments to subcontractors, GovEX handles interaction with the HMRC via the Government Gateway, and CISlink is a customisable bidirectional link to external databases.

The software comes with a hard copy/online manual, and comprehensive support including a free telephone helpline, online help screens, customer website and newsletters. A demonstration version of the software can be downloaded from Forbes' website. In addition, registered users can update their software from the website, from which they also have online access to Notes online, with up-to-date technical information and news.

Contact	Sales
Address	Forbes Computer Systems, Forbes Computer Systems, Guise House, Aspley Guise, Bedfordshire MK17 8HQ
Tel	01908 584674
Internet	www.tax.co.uk
Cost	ProTax: from £195 plus VAT. CISassist: from £595. Other prices available from www.tax.co.uk
Rec spec	Windows XP; Pentium III, 256mb RAM; 250mb hard disk space

IRIS Software Group

IRIS Software Group was formed in June 2007 through the merger of IRIS with the Computer Software Group to form the largest privately owned software business in the UK. IRIS has been producing tax software for 32 years and was the winner of the best tax software category at the inaugural LexisNexis tax awards in 2001. Its full suite of products is accredited by the ICAEW. The company is a Microsoft gold partner.

IRIS was the first software company to provide fully integrated software. Its products integrate completely with each other and this is a major attraction for most IRIS customers. The Central Database module forms the hub of the software. Client data is fed into this module and flows automatically into the rest of the system, so that, for example, a client's change of address has only to be entered once. The data can also be used to create automatic client letters, and for other marketing purposes. Online filing comes as standard with all the tax modules.

IRIS Personal Tax, used on 5,278 sites, covers virtually all aspects of self assessment. It handles self-assessment returns for directors, partners, sole traders, individuals, Lloyd's underwriters, and ministers of religion; only MPs are not catered for. Much of the required client information is drawn from the single central database, with reliefs and other income entered separately. The software has a tree menu structure, similar to Windows Explorer, and users use the mouse to move up and down the tree, or if they prefer use the tab key.

The software produces the relevant backing schedules and tax calculations, payments on account, with capital gains tax being calculated automatically. The pension planner deals with retirement annuities and personal pension contributions. Car benefit is calculated, and forms P11D are produced for clients and employees of business clients. It also has a car database giving details of carbon dioxide emissions.

At the start of the tax year, automatic checklist letters for each client can be organised, listing the relevant entries in the previous year's return and asking the client to enter in the current year's figures. As well filling tax returns online, forms P11D can also be filed this way. The online function is linked to Practice Management and each tax return has to be approved before it can be sent. This is safeguard means that incomplete returns cannot be submitted.

Securities Taxation Information

Helping you solve the puzzle

Offering a range of invaluable reference tools for accountants and tax professionals, Interactive Data provides a wealth of securities taxation information on thousands of UK, Irish and international securities.

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- Enables instant access to the latest data where and when you need it
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- Includes up to 25 years of capital changes and dividend history
- Is available in online, CD-ROM and print formats

For further information call the team on +44 (0)20 7825 8100 or email enquiries@interactivedata.com

www.interactivedataclients.com

Interactive Data

IRIS Business Tax, which is iXBRL compliant, deals with limited companies, partnerships and sole traders and is used on 5,447 sites. It draws information from IRIS Accounts Production. Wholly and partially disallowed accounts are flagged within the database. IRIS Non Resident Company Returns for SA700 is available as an additional module.

Details from the optional IRIS Fixed Asset Register module are taken to provide the basis for the capital allowances schedule. For limited companies, the detailed corporation tax computation deals with apportionment over fiscal years, marginal rate relief, non-corporate distribution rate, and losses carried forward, backward or used in the period. Both the short and detailed CT600 and all supplementary pages can be produced. It copes with up to four corporation tax accounting periods. Deferred tax calculations can also be produced. The partnership return is available for partnerships with the partners' shares of profit are calculated automatically, and details placed in the appropriate personal tax records. Sole traders' data is automatically stored in the personal tax record for transfer to the self employment schedule of the SA100. Data entry for tax disclosure is available to comply with the disclosure of tax avoidance schemes legislation in all the tax packages. In addition it has a UITF 40 facility.

The IRIS Dividend Service is a separate module which uses data from Interactive Data, providing users with information on all UK listed companies and unit trusts. Clients' dividends are calculated automatically and entered into the relevant boxes on the tax return.

IRIS Practice Management deals with practice management. All the modules link with this module enabling practices to track the progress of each return and other jobs. For example, it is possible to track a return from the initial checklist through to it being accepted by HMRC. It effectively controls the workflow, producing a list of daily tasks for each user. It is available all the time, so that employees can work on other IRIS modules at the same time. It also has a data-mining facility, whereby the user can ask specific questions to produce a report on personal tax data. Users who are keen to promote the paperless office can take advantage of the document scanning and file management system within the module to store all client correspondence and other documents in one place. A comprehensive search facility allows the documents to be retrieved easily.

AutoMail generates routine correspondence for clients. This has a wide range of templates which the user can amend and store as necessary. Time & Fees automates the timesheet process, collecting the information to raise invoices. It also allows supervisors to monitor employees' work. Other modules include Accounts Production, Fixed Asset Register, Company Secretarial and Company Formations.

IRIS Trust Tax deals with the principle trust and estate tax forms (which can be filed online), including forms R185, form 41G trust enquiry, form 50FS for non-resident trusts, and the SA923 pensions form and relevant computations. It also links with the practice management module, so job progress can be tracked. Another useful feature is the extract/import facility by means of the purchase of a screen whereby users can extract a client's data from the main system and put it on to a laptop computer. Using this facility, the user can work on the client's tax during a visit and downloaded later on to the main system.

IRIS products are suitable for any size of practice. Small firms can opt for a 'starter pack'. This includes Personal Tax, Business Tax and Accounts Production, and was designed specifically for smaller practices, tax advisers and start ups. The entry level caters for ten clients, but it can be upgraded and additional modules added as the business's client base develops.

The modules come with context sensitive help and training is available at extra cost. Additional help is available via a help desk, customer website, online knowledge base, newsletters, e-mail bulletin service and seminar programmes. The system and updates are available online or by CD-ROM on request.

Contact	Sales department
Address	IRIS Accountancy Practice Solutions, Riding Court House, Datchet, Berkshire SL3 9JT
Tel	0844 815 5555
Internet	www.iris.co.uk/accountancy
Cost	price is dependent on number of clients and number of software users
Rec spec	Windows XP; 1gb RAM; 10gb hard disk space

Keytime

Keytime

Keytime is an independently owned company that has produced its self assessment software, Tax Professional for more than ten years, and has produced its payroll software since 1992. It provides a wide range of software including personal and corporate tax, accounts, practice management, payroll and P11D, all with the small and medium sized practice in mind.

The Client Manager forms the central hub for the various other modules of the Accountants Suite. Client data is entered only once and stored in Client Manager, from where it feeds across all the modules used.

Tax Professional is an effective and good-value package with a high level of integration used by more than 1,500 firms. It produces a range of HMRC approved personal tax returns, including partnerships (short and full pages), trusts, capital gains, ministers of religion, and the SA800 partnership return, but not MPs or Lloyd's underwriters. The client's liability is computed automatically, and shows the payments on account due. Form SA303 can be produced to reduce these payments. Information is entered using an interview format, and optional wizards help simplify this process. If preferred, information can be entered direct on the on-screen tax return or users can take advantage of the rapid data entry facility. Each set of pages has its own rapid data entry screen through which all the relevant information for that section can be entered. Change of accounting year and planning is available, but not pension planning.

The software keeps track of the annual return process using the client tracker feature. This charts important dates relating to a client's return, for instance, when the information is received, when the return is sent to the client for approval and then submitted to HMRC, and when an invoice is raised. Standard letters can be produced and there is a mailmerge facility. Password protection is available. An online filing facility is included in the software.

The package comes with a hard copy and online manual and online help screens. It includes free support, including telephone helpline, updates and enhancements. HMRC help notes and context sensitive help are included. The complete program can be downloaded from the firm's website, as can an evaluation copy and updates.

Keytime Trust Tax (SA900) was launched in September 2008. This deals with all aspects of completing forms SA900 and submitting them online. A paper version can also be produced for the client if required.

Keytime Corporation Tax Professional produces the CT600 form, calculating the profits chargeable to corporation tax and inclusive of Internet filing. It also does capital gains tax computation and allocates capital losses. Other features include: analysis of brought forward and current year trading losses, and capital allowance calculations. While not aimed at high-end companies, this software is suited to high street accountants with a few companies as clients. Keytime Accounts Production and Corporation Tax are planned to be iXBRL enabled during 2010.

Practice management is dealt with by Client Manager Plus, launched in 2010. This provides communications management (letter, e-mail, fax, etc), tracks deadlines, deals with time and billing, document management and integrates with the other Keytime products. Keytime also produces Payroll, P11D Calculator, Accounts Production, and Books (an online accounting solution), Backup (online data backup software that allows the user to protect his files by dragging and dropping them into remote storage).

All the Accountants Suite modules are accredited by the Institute of Financial Accountants.

Contact	Anthony Boggiano
Address	Keytime, Pennine House, Denton Lane, Chadderton, Oldham, Lancs OL9 8PU
Tel	0161 484 3500
E-mail	info@keytime.co.uk
Internet	www.keytime.co.uk
Cost	Tax Professional – £205 to £405; Corporation Tax Professional – £205 to £4050; Accounts Production – £2085 to £405; Payroll: £325; P11D Calculator – £160; Trust Tax – £205 to £405
Rec spec	Windows 7, Vista, XP or 2000; 256/512mb RAM; 0.5/1mb hard disk space

PTP Software Ltd

PTP Software has been producing reasonably priced, effective software since 1994. It became part of the IRIS Software Group in 2006 giving it the backing of a much bigger company, and access to a wider team of expertise and knowledge to call on as and when required. More than 5,000 firms use PTP software and 60% of the top 50 accountancy firms use at least one product.

Tax Return is the income tax return package (winner of the best tax software category at the LexisNexis tax awards in 2008), and offers all the supplementary pages, apart from those for MPs. The R40 repayment form is also available. Information is entered on to the tax return, rather than using a menu system, with a fanned page taking the user to the many backing schedules available. An eye icon indicates that information was included in the previous year. Tax calculations are performed automatically, and a validation system checks that the information all corresponds. Data can be imported from various accounts preparation packages, including Compac and VT. The software calculates payments on account, and produces form SA303 for reducing payments on account. It also has a dividend database with more than 350 FTSE companies, and an events section enabling the user to track the progress of the client's affairs. The HMRC help notes are available by using the F1 button.

The software produces a range of reports and standard letters. Online filing is included in the software and attachments can be sent with the form. The capital gains facility deals with computations, although there are restrictions on the number of enhancement expenditure entries it can handle. With regard to planning, the Tax Fast module deals with change of accounting year, and CGT Planner deals with capital gains tax planning.

An online manual and installation guide are supplied. Training is available at extra cost for users. In addition, there are online help screens, a telephone hotline, and customer website.

The Partnership Return module resembles Tax Return in appearance, and is similar to operate, using the same database. Once a partnership's details have been entered on to the Partnership Return, the partners can be added by clicking as appropriate from the list of clients contained in the Tax Return database. When the partnership information has been dealt with, it automatically makes the appropriate entries on the partnership supplementary pages.

Trust Return also uses the style of Tax Return, and deals with any type of trust and required calculations. The program includes a dividend database and links to the TROIKA trust management program.

Tax Return, Partnership Return and Trust Return are part of a Tax Platform. The advantage to users of this is that, by using data common to all three returns, users can access all years and return types from one program.

PTP Accounts is the final accounts preparation software for sole traders, partnerships and limited companies. It has same look as the Tax Platform, and links seamlessly with CT Platform, Tax Return and Partnership Return. The software produces a pdf version of the accounts for e-mailing to the client.

Tax Fast is the year end planning, current year basis and change of accounting date module. It also includes adjustments for the abolition of the cash basis, the ability to calculate tax provisions for partnerships, the ability to determine the impact of UITF 40 and has a separate input facility for partners' personal expenses.

CT Platform, which is iXBRL compliant, completes limited company tax returns CT600. It collects the data, performs the calculations and checks that the necessary boxes have been completed for corporation tax self assessment. The module includes an adjusted tax computation and capital allowances calculator including annual investment allowance (AIA) and copes with the non-corporate distribution charge where appropriate. Small companies marginal relief is calculated automatically. It has standard letters and mailmerge facilities, and a pdf version of the return can be e-mailed to clients. Online filing of the return is included in the product.

Tax Data contains assorted useful tax information including tax rates, allowances, and addresses. The principal claims and elections are included as pro forma documents, which can be cut and pasted for submission to HMRC. Wizcalcs enable the user to carry out calculations on screen in respect of authorised mileage rates, small companies marginal relief, VAT, etc.

Practice management is dealt with by The Professional Office. This offers time recording, fees and work in progress, client contact details, marketing functions, ledgers, reports and system administration. Considerable amounts of tedious, but necessary, administration can be automised, for instance by creating customised marketing or reports.

Company Car Planner allows the user to input the basic data relating to the employee, including the make and model of vehicle, tax and National Insurance rate, the program then calculates the benefit for the period over which the car will be provided. The user can then view the alternative methods of funding based on a combination of in-built and user-defined factors. A current database of official carbon dioxide emissions for all current cars is included.

Clients' capital gains tax liabilities can be calculated using CGT Planner. This handles claims for hold over, roll over and entrepreneurs' relief. The user enters the details of the transaction, acquisition date and costs, disposal date and proceeds, any other related costs, etc., and the program automatically calculates the capital gains liability taking into account all the available reliefs. An 'optimiser' function shows the most beneficial time to complete the disposal.

PTP's IHT Planner calculates lifetime transfer tax, lifetime transfer on death tax and the chargeable estate at the date of death. It also deals with what-if? Planning, for example showing the effect of projected lifetime gifts and the likely death estate. The IHT400 return and all supplementary forms can be produced using IRIS Laserform.

PTP also has a company secretarial package called PC Share Register Plus, and some additional spreadsheet planners including Incorporation Planner, Dividend v Salary Planner, and Tax Credit Planner.

PTP's software is aimed at all practitioners and is used by sole traders to top five firms alike and is also used by tax shops. It is consistently reliable, easy to use and popular. PTP's compliance products are fully integrated, but the added value ones remain separate stand alone programs. This is on the basis that the latter do not require integration and it would be an unnecessary complication.

A demonstration of all the products is available to download from the PTP website or via a CD by request.

Contact Sales department
Address PTP Software Ltd, Riding Court House, Riding Court Road, Datchet, Berkshire SL3 9JT
Tel 0844 815 5530
Internet www.ptpsoftware.co.uk
Cost Tax Return: from £125 plus VAT to £675 plus VAT; Partnership Return: from £125 plus VAT to £385 plus VAT; Trust Return: from £125 plus VAT to £675 plus VAT; PTP Accounts: from £125 plus VAT to £1,360 plus VAT; CT Platform: from £125 to £675; Company Car Planner: from £120 plus VAT to £240 plus VAT; CGT Planner from £65 plus VAT to £130 plus VAT; Tax Fast: from £120 plus VAT to £240 plus VAT; IHT Planner from £120 plus VAT to £240 plus VAT. Pricing is subject to number of returns (where appropriate), and whether on network or stand alone basis
Rec spec Windows XP; Pentium 4.1; 1gb RAM; 5gb hard disc space

Quality Management Software Ltd

Quality Management Software Ltd is a small, independent supplier of taxation software which has been producing its self assessment package, SA2000, since 1997, and CT600 since 1999. The software is aimed mainly at small and medium sized firms of accountants and financial advisers, although has users of all sizes.

SA2000 is an Excel spreadsheet with a database and is straightforward to use. The number of users or clients in one office is unlimited. The individual tax return module deals with personal tax returns, including those for Lloyd's underwriters and ministers of religion. The SA800 partnership tax return and the SA900 trust tax return can also be produced. The partnership and individual returns are linked automatically, and there are additional reports for non-residents. Multiple employments and self-employments are catered for.

Information is entered directly onto the on-screen tax return, using the tab button to move along the return. Alternatively, an interview format can be used The tax calculation is performed automatically using its own version of the tax calculation. It contains in-built cross-checks to ensure that the responses on the return are consistent.

A 'Know your client' page provides a useful summary of the client's income and tax bill. Information can be imported from accounts preparation packages.

SA2000 supports online filing at no extra cost. Forms and reports can be saved to Adobe pdf format for archiving and can be attached to e-mails.

Particularly suited to users who have to deal with small companies, the corporation tax software, CT600, produces the corporation tax CT600 form and is iXBRL compliant. The corporation tax computation is produced automatically. It deals with expensive car lease restriction, non-corporate distribution charge, research and development tax credits, fixed asset reconciliation, non-resident landlord companies and group relief. It has extra sheets for accounts reconciliation, and details of the tax computation. Sections are included for disallowable items and items taxable under Schedule A, D cases V and VI. Reports can be exported to other applications, including Excel.

The software is supplied with a hard copy manual and training; a helpdesk is also available.

The company has joint ventures with the Mercia Group Ltd and PracticeNet. It also produces software for the Jersey company and individual tax return. CIS Return, launched in 2006, produces statements, allows the online verification of subcontractors and supports online filing. PAYE2000 allows the completion of employers' end of year returns for online submission, and IHT100 deals with the completion of inheritance tax returns.

An evaluation copy of the individual tax software can be downloaded from the company website.

Contact Andrew Bolton
Address QMS Ltd,
4 Huxley Close,
Godalming,
Surrey GU7 2AS
Tel 01483 429078
E-mail sales@sa2000.co.uk
Internet www.sa2000.co.uk
Cost price on application
Rec spec Windows; 128mb RAM; and 20mb hard disk space

RFA Ltd

RFA Ltd has been producing its tax and accounting software since 1993. Known as Pinacle, the software deals with personal, partnership and trust tax returns, company tax returns, accounts production, limited companies, book-keeping, payroll and practice management. The software is fully integrated in a relational database, so all client data can be shared across the modules used. The client data may be accessed by products from other suppliers eg: spreadsheets and word processing. As the software is written in Oracle it has great flexibility and excellent data mining capability.

The taxation module deals with personal, partnership and trust self assessment tax returns. Most of the supplementary pages are catered for, although currently not Lloyd's underwriters, minister of religion, or MPs. Up to ten employments and four self-employments can be included. Data is entered via the on-screen tax return and the computation is done automatically, including capital gains tax computations. The data can be previewed before printing and a facsimile return and schedules can be produced in hard copy or PDF format for sending to the client. A full range of reports, eg R40, SA303 and 64-8, are available. Pension planning can also be carried out. The software also handles trust tax. Online filing is included.

In addition, a P11D module is available. This generates facsimile P11D and P11D(b) forms and supporting schedules. Historical data is easily available for comparison and review. The integration uses company and employee data in common with payroll and transcribes P11D data to the benefits section on the employment pages of the personal tax return.

The company tax module produces the company tax return and does the tax reconciliation. It copes with group relief, what if planning, research and development tax credits, expensive car lease restriction, investment companies with trading sources, and unit trust and open-ended investment companies. It has a capital gains facility.

Data is carried forward year on year and a checklist is created for the collection of client data.

The accounts module produces clear accounts for sole traders, partnerships, companies, limited liability partnerships, doctors, trusts and investment syndicates. Once entered, the information flows seamlessly into other modules, eg the client's personal tax return, so there is no need to rekey or press any buttons to transfer this information.

Aimed at the smaller end of the accountancy firm market, the software is simple and intuitive to use, and represents good value.

Help comes in the form of a hard copy or online manual, training, online help screens, telephone hotline, customer website, e-mail bulletin service and newsletters. The package can be supplied on CD-ROM or online.

Contact Roland Ford
Address RFA Ltd, 146 Pinehurst Road, West Moors, Ferndown, Dorset BH22 0EN
Tel 01202 890897
E-mail sales@pinacleaccounts.co.uk
Internet www.pinacleaccounts.co.uk
Cost from £200
Rec spec Windows or Linux; 1Gb RAM; 20Gb hard disk space

Sage (UK) Limited

Sage provides an integrated suite of software to cover all accountancy practice needs. Sage Practice Solution provides enhanced integration between the various Sage products for practice. At the heart of Sage Practice Solution is the Practice Hub where users can maintain their client data. Once keyed, data flows from the hub through to the user's other software modules, which allows for greater efficiency of data maintenance for the user. The software sits on a SQL database.

Sage Taxation offers a range of modules including Control Centre, Personal, Business, Partnership and Trust Tax and currently supports electronic filing for individuals partnerships and trusts, together with the facility to include pdf attachments to the electronic return. Success rates for online filing exceeded 99% for all return types in the year to 31 January 2009

Validation against both HMRC's and Sage's own validation criteria ensure that returns are suitable for electronic submission and that errors are caught and repaired before the return is filed.

Sage Personal Tax is a comprehensive package producing the self assessment return and related supplementary pages, including ministers of religion, MPs and Lloyd's underwriters, supporting data schedules, and calculations of income and capital gains tax. There is menu style data entry for keying in client data, or details can be entered directly on to the on-screen tax return.

Data for a tax year can be rolled forward to enable the calculation of an estimated liability for the next tax year. Where appropriate an application to reduce tax payments on account can be generated on form SA303. The software also includes the facility to record joint income data for husband and wife, or other joint income scenarios, and percentage shares can be applied to apportion the income details and then apply these automatically between the joint holders. To increase efficiency and accuracy, dividend income is available via on-screen access to a securities database listing all relevant transactions of UK listed companies.

Sage Business and Partnership Tax deal with self-employed clients and clients in partnerships. Business accounts data is available from Sage Instant Accounts Production, Sage Accounts Production and Sage Accounts Production Advanced, and can also be imported from most other accounts production systems.

Sage Business Tax can be used to compute the adjusted profit for tax purposes for sole trade and partnership businesses. Functions include detailed capital allowance calculations, overlap profits and reliefs, partnership profit sharing for trading income, cash-basis and UITF40 adjustments, farmers' averaging and change of accounting year planning.

Sage Partnership Tax produces the full range of partnership SA800 returns. These can be populated with the data from Business Tax or completed manually. Full partnership profit sharing across all income types is also included. Full validations are carried out to ensure the return is valid for electronic submission.

Sage Trust Tax delivers the full range of SA900 forms together with the trust tax calculation and includes the same validation process as individual and partnership returns.

Sage Control Centre collates client data from Sage Taxation modules to provide a central administration function with a comprehensive library of standard reports and letters. Users are also able to create and save their own report and letter templates.

The client data held in the database can be used to generate letters for export into Microsoft Word format. Batch production of client-specific annual data questionnaires based on the information available for the previous tax year's return can also be produced. Users are able to create tasks and reminders to allocate against clients or assign to different users. Individual clients can be password protected.

The software uses an explorer style navigator making it familiar and easy to use for most PC users. Income, expenses, reliefs and gains have intuitive input screens that make additional options available only when applicable. Data entry is flexible with users able to use either the keyboard or the mouse to move around the program.

Guides are included with the software, and extra training, if needed, is available. Other support includes telephone customer service, monthly support bulletins, seminar programmes and product review groups. All updates can be downloaded from the Internet, with all critical releases additionally sent to customers on CD. Software prices are based on numbers of users and clients.

In April 2009 Sage Instant Taxation was launched. This produces the full range of SA100 returns and schedules included in Sage Taxation, sharing the same comprehensive validation rules for online filing. This is an entry level product aimed at smaller practices preparing up to 100 self assessment returns for individuals. Prices start from £99 or it can be purchased as part of a compliance starter pack aimed at smaller accountants including Sage Instant Accounts Production, Sage Corporation Tax (powered by Abacus) Lite and Sage Practice Solution

Contact	Sales team/customer services
Address	Sage (UK) Limited, Building 3, Exchange Quay, Salford Quays, Manchester, M5 3ED
Tel	0845 111 11 11
Internet	www.sage.co.uk/accountants
Cost	Sage Taxation – from £215 (including annual licence);
Rec spec	Windows XP or above; 1Gb RAM; 10Gb hard disk space

Taxshield

Taxshield is a brand name of Shield Products. Launched 14 years ago, the tax software products are designed and tested within the company to ensure compliance and ease of use. The software is used by firms of all sizes ranging from sole practitioners to the big four.

Personal Tax Manager is the self assessment software dealing with most aspects of self assessment, including R40 and SA800 together with the supplementary pages. It is laid out for easy and clear access to all areas with a fresh and user-friendly approach. The tax calculation is produced, showing payments on account and data can be carried forward year on year. 'What-if?' planning is possible by amendment of existing data, including pension planning, but not changes of accounting year. Lloyd's underwriters and ministers of religion are catered for. The adjusted figure for capital gains tax needs to be entered manually, but the system then deals with it in the calculation. Returns can be filed online.

The corporation tax module Corporation Tax Manager produces forms CT600, all the supplementary pages, and potentially unlimited computations. It allows Schedule A computations, and calculates capital allowances. Two versions are available: one for simple returns, and one for more complex returns. It is aimed at the small to medium sized practice which needs a cost effective package that will deal with relatively straightforward computations.

All products come with online help screens, telephone support and newsletters. In addition, there is a customer website and online knowledge base. Evaluation copies of the software can be downloaded from the company's website.

Contact	Anna Walker
Address	Taxshield, 11/12 Hingley Street, Cradley Heath, West Midlands B64 5LA
Tel	0870 609 1918
Internet	www.taxshield.co.uk
Cost	price on application
Rec spec	(PC)1Gb RAM, 1Gb hard disk space; DVD reader; (server) 2Gb of RAM; 1Gb hard disk space

THOMSON REUTERS DIGITA

Thomson Reuters – Digita

Digita is a very successful company which has been producing tax software for 24 years. It provides software to tax professionals in all sizes of firm, from the big four to sole practitioners, and some FTSE companies and the legal profession.

In April 2008, Digita became part of the Thomson Reuters Group, which among other advantages gives the company access to the huge technological resources of a global conglomerate which will help it develop its products to an even greater extent than it already did.

Digita's Personal, Business Tax, Trust Tax and Corporation Tax have all been certified by Microsoft for use with Windows XP, Vista and Windows 7. In addition, these products are accredited under the ICAEW's IT accredited product scheme. Also Digita is the only software supplier to have won the LexisNexis best tax software award three times: in 2007, 2006 and 2003.

As well as producing software for professional tax practitioners, Digita has developed financial software for Microsoft and MSN Money.

Digita Personal Tax handles most aspects of the self assessment tax return, including partnerships, Lloyd's underwriters, MPs and ministers of religion. HMRC help notes and help sheets are included. Tax is calculated automatically, showing the payments on account and the form SA303 for reducing payments on account can be produced. The software includes the automatic calculation of foreign tax credit relief, excluded income and the dual residency and non-UK resident worksheets IR302 and IR304. An optional extra will provide for the equalisation calculations for expat employees paid net of tax.

On the capital gains tax front, the system deals with all aspects of the post 5 April 2008 CGT regime for any type of asset. For partial security disposals it calculates the average cost to compare to the disposal proceeds. The simple CGT client schedule produced as a pdf attachment is then used with online filing.

An inbuilt comprehensive dividend data feed from Interactive Data calculates the dividends on shares, dividend paying unit trusts and interest paying unit trusts. It contains details of the full FTSE equity dividends, well-known unit trust managers and open ended investment companies. Data for 100 of the most popular companies is supplied free of charge, while the full feed is available at reasonable cost.

Pension and 'what if' planning are catered for. Accounts details can be imported from Digita's own final accounts production software, as well as various other packages, such as, CaseWare, Eureka, Microsoft Excel, ProAcc, Sage SAP and SAPA, Viztopia and VT. The system also has practice management links with APS Advance, Caseware Time, Practice Engine, and Star.

Digita Business Tax is a comprehensive system that calculates basis periods, assessable profits, capital allowances, overlap relief and deals with changes of accounting date. It produces the partnership forms and other required reports and summaries. All relevant data is posted automatically to the partner's personal tax return.

Returns can be submitted online, something which Digita actively promotes, having held joint seminars in the past with HMRC to explain the benefits of online filing.

The software has a wide range of risk management and workflow monitoring features built in. This includes the Client Review tool which compares the income sources of the client with the previous year's return, eliminating the need for paper comparisons. The tool significantly reduces the risk of errors and the automation saves the time that the user would previously have spent doing the check. It also links to the Client Costing tool enabling the user to create a risk profile of the client and monitor changes during the review process.

TaxAware uses artificial intelligence to monitor the tax return compliance process. It constantly polls the data looking for inconsistencies, errors of entry, as well as planning opportunities, warning the user during the process. The key aspect of this technology is that all issues highlighted are specific to the client.

Digita recently launched Tax Exchange, a data import and validation system that automates data collection from various sources, including spreadsheets, scanned documents, banks, brokers, payroll systems and client portals. The aim is to increase productivity and provide a cost-efficient method to automate data gathering securely. The aim is to reduce the time it takes advisers to gather client information. Unqualified staff can be used for this process, freeing up the qualified employees to deal with more lucrative advisory and consultancy work.

Digita Trust Tax deals with forms SA900 and its related forms to allow users to prepare tax returns for trusts and estates. A distribution tool allows the allocation of income to beneficiaries and then posted automatically to the relevant sections of beneficiaries' personal tax returns. A full range of reports and tax computations, R185 tax certificate production facilities and internet filing are included as standard.

Digita Accounts Production produces final accounts and is also accredited by the ICAEW. Trial balances can be created in seconds and client files can be signed out for working at other sites. It also links with Digita Personal, Business and Trust Tax and Digita Corporation Tax.

Digita Contact Manager provides a single point of data entry for contact and relationship information shared within the Digita range of products. Contact information is shared seamlessly across all products within the suite. As it adheres to xAPL, the ICAEW data sharing standard, it also enables integration with third party suppliers' products.

Digita Practice Management provides a comprehensive tool set for users and practices to manage work and monitor efficiency. The Time and Fees module allow for not only clear and quick time capture but concise analysis through the new versatile reports tool. Jobs and tasks can be assigned and tracked providing the user with a fully automated practice solution.

An additional, optional module is available for letter writing and facsimile forms. It can, for example, generate client mailshots so that a specific service, say pension planning, could be offered to those not already receiving it.

FileCabinet, Digita's own integrated document management solution, helps the user create the paperless office by storing documents securely on the user's computer systems. Its online client portal feature, NetClient is a client portal system whereby clients can log in and access documents or transfer files on the user's website. Information is password protected and encrypted so both users and clients are assured of data security.

Other Digita products include Company Secretarial, a company administration package which includes electronic filing and helps with completion of form 42 and P11D Production which Digita distributes in conjunction with PKF.

An online manual is supplied with the software, and training can be arranged at extra cost if required (available at Digita's or the client's premises, or over the Internet). Other help is available in the form of online help-screens, telephone hotlines, customer website, newsletters, seminars, etc.

The software uses Microsoft SQL/SQL Express database technology which allows the user scalability of database. The products provide full integration, regardless of whether the user has only Digita products or has software from other suppliers.

Contact Karen Gardner
Address Digita,
Liverton Business Park,
Exmouth EX8 2NR

Tel 01395 270311 **Fax** 01395 268893
E-mail karen.gardner@thomsonreuters.com
Internet www.digita.com
Cost price on application
Rec spec supplied on request

Working From Home

Ever increasing numbers of employees work from home for at least some of the week. Many do not know that they can claim tax relief for part use of home for work, provided that the nature of the job necessitates that the employee works from home. Even if they are aware that they can claim expenses, they do not know what to claim or how.

Working From Home Ltd has produced its software, specifically designed for such employees, for eight years. It works by asking the employee a series of questions and using that information to produce a letter and supporting computations to the tax office. Using the software, employees can calculate the tax which can be reclaimed relating to the expenses incurred when working at home, e.g. use of home office, own car, capital equipment and the additional cost of heating, lighting, and other expenditure. In addition, the program produces employees' claims for using their own cars for work and flat rate expenses under ITEPA 2003, s 367 (formerly Extra-statutory Concession A1).

It handles refund claims going back up to four years. The software is suitable for all employees who incur job-related expenses, including those who do not work at home. It is supplied on CD-ROM and includes an online manual together with online help screens, a help desk, customer website and newsletters.

Corporate licences and multi-user licenses are available for companies purchasing on behalf of their employees or for accountants to use on behalf of their clients.

Contact David Kitley
Address Working From Home Ltd,
8 Highgrove Park,
Maidenhead,
Berkshire SL6 7PQ
Tel 01628 626330 **Fax** 01628 781306
E-mail info@workingfromhome.ltd.uk
Internet www.workingfromhome.ltd.uk
Cost £19.95 (ex VAT) single client, £65 (ex VAT) up to ten clients, £195 up to 100 clients
Rec spec Windows 2000, XP, Vista; minimal RAM; minimal hard disk space

Corporation tax

The packages covered in this category vary in widely in terms of what they do and the markets they serve, and are priced accordingly.

Acorah Software Products (TaxCalc)

TaxCalc Pro Suite provides a Corporation Tax system similar to the SA Package aimed at two to three partner firms with some companies as clients, rather than large conglomerates. It is not tailored to cover groups of companies, rather it provides tax computations, CGT calculations including indexation and taper relief together with automatically created pdf computations. It follows the structure of the income tax product.

Information can be entered using a 'SimpleStep' interview process or by direct form entry. All CT600 forms are covered. The software handles marginal rate relief and calculations can be exported to Word or Excel. A full listing of all data entries is made. Returns can be filed online.

In conjunction with Arkk Solutions, TaxCalc has developed an online XBRL conversion tool for Excel users to file their accounts. The facility allows templated Excel accounts to be uploaded to a secure web server hosted by TaxCalc, a tagged iXBRL file is then returned ready for filing to HMRC.

The software comes with a free pdf manual, online help screens and customer support with the ability to make anonymous and e-mail client data for support purposes. There is a customer website, occasional e-mail bulletin service and newsletters, online knowledge base and product review groups. Updates are provided by an automatic TaxCalc live update, and an evaluation copy can be downloaded from the website.

TaxCalc won best tax software in the AccountingWeb's Software Satisfaction Awards 2008 and 2009.

Contact Sales
Address Acorah Software Products, 4 King Street Lane, Wokingham, RG41 5AS
Tel 0845 5190 882
Internet www.taxcalc.com
Cost CT Unlimited – £150;
supplied as part of TaxCalc Pro Suite – £400
Rec spec Windows XP; Pentium 4; 256mb RAM; 100mb hard disk space

BTCSoftware

BTCSoftware's CT Solution was launched in 2002. This comprehensive product enables users to prepare corporation tax computations, calculate the corporation tax due and automatically completes corresponding CT600 forms. While it is not designed to deal with global businesses, it is suitable for most small to medium sized companies. The module includes deferred tax capability and is FRS 19 compliant. In addition it copes with recording tax losses, fixed assets additions, disposals and capital allowances, finance leases and contract hire rentals (including expensive cars), income and expenditure analyses, income and expenditure from property, loan relationships, marginal relief calculation and (for historic returns) the non-corporate distribution rate.

CT Solution Express first introduced in 2008. Aimed at advisers who need to prepare the Schedule D Case I computation for a trading company and calculate the resulting corporation tax liability, including the calculation of any marginal relief, it provides users with a one page adjustment of profits computation without other entry screens, automatically producing the CT600.

Online filing is included with both products and iXBRL documents can be submitted.

Support is as outlined in the Personal tax section.

Contact Andrew Ross
Address BTCSoftware,
Lyndale House, 24 High Street, Addlestone, KT15 1TN
Tel 0800 612 7650 or 01932 840572
Internet www.btcsoftware.co.uk
Cost CT Solution £195 plus VAT;
CT Solution Express – £175 plus VAT; P11D – from £150
Rec spec Windows XP, Vista or 7; 512mb RAM; 1.5gb hard disk space

CCH
a Wolters Kluwer business

CCH

CCH Corporation Tax produces the facsimile CT600 and supplementary forms CT600A, B, C, E, G, H and J and automatically calculates the corporation tax liability. Returns can be filed online with pdf attachments. The computations can be printed in draft form if required (with a simulated watermark showing 'draft'), and hyperlinks, shown as blue text, refer back to how the computation was carried out. The user can drill down from the computations. The software includes a comprehensive range of cross-referenced backing schedules.

It does not take long to set up a client with only the company code and name required for basic set up. Information can be entered using drop-down menus, or by drilling down from the relevant entry in the tax return. Alternatively, shortcut keys can be used to carry out all operations via the keyboard. There is also a report pack built into CCH Corporation Tax which gives a summary of each company, including variance reports, group overviews and loss schedules.

CCH Corporation Tax handles long and short accounting periods, capital allowances, shadow advance corporation tax, foreign tax, close companies, dormant companies, groups, investment companies, hybrid companies and trading companies.

Online help is available based on an Explorer tree structure, with hyperlinks to specific topics. The client file can be locked, so that the user can carry out work elsewhere, without colleagues in the office being able to make changes to the file.

Everything is extractable in pdf. The computation can be in Excel, should the user wish to carry out his own modelling. Returns can be filed online with pdf attachments.

CCH Corporation Tax is aimed at small to medium sized firms and has been designed to be simple to use. It has the functionality which most practitioners will need for day-to-day dealings with their company clients. It is intended to provide technical competence without overwhelming the user with features that he is rarely, if ever, likely to use. However, because of the flexible nature of the software, new features can be developed if clients call for them.

Contact Sales administration
Address 145 London Road, Kingston Upon Thames, Surrey KT2 6SR
Tel 0844 561 8181 Fax 020 8547 2638
E-mail cchsoftware@wolterskluwer.co.uk
Internet www.cch.co.uk/softwareproducts
Cost prices on application
Rec spec Windows XP Pro SP2, 2Gb RAM, 15Gb hard disk space

FORBES Computer Systems

Forbes Computer Systems Ltd

Forbes corporation tax software, ProTax CT, completes both the tax computation and the relevant tax forms for all chargeable periods created. It produces both the new short and long corporation tax return forms as well as all the supplementary forms. The module includes an adjusted profit computation and a capital allowances program. Small companies marginal relief and non-corporate distributions are calculated automatically. This is a straightforward program suitable for most companies that the high street practitioner will deal with, but is not aimed at multi-national conglomerates.

Data is entered directly on to the tax return forms. Much of the data can be drawn from the Client Database module, which flows automatically into the rest of the system. Accounts details can be imported from Forbes Accounts, and from various other external accounts providers.

ProTax CT also enables the user to submit all the necessary documents, including the computations and accounts, online. Importantly, the software is iXBRL-compliant. It was the first product to get iXBRL recognition from HMRC and first to transmit a corporation tax return with iXBRL attachments.

Support is as outlined under Forbes' entry in the personal tax section of this supplement.

Contact Sales
Address Forbes Computer Systems, Guise House, Aspley Guise, Bedfordshire MK17 8HQ
Tel 01908 584674
Internet www.tax.co.uk
Cost ProTax CT: from £195 plus VAT
Rec spec Windows XP; Pentium III; 256mb RAM; 250mb hard disk space

sage

Sage (UK) Limited

Sage Corporation Tax (powered by Abacus) is a modular packaged product powered by Thomson Reuters' Abacus technology used by over 1,800 individual accountancy practices.

The Standard module is a powerful package covering virtually all aspects of general UK corporation tax, including online filing and a comprehensive tracking and administration database for management reporting. Risk management, group, deferred tax and advanced modules are also available. The software provides sets of annual packs covering single trade, investment and multiple trade companies, and more specialist companies, eg ring-fence companies. Each pack has a basic set of schedules to which additional standard schedules can be added and which are automatically cross-referenced to existing schedules, as necessary. User-defined schedules can be created if required.

The software deals with long and short periods of account. Other features include full automatic recalculation, automatic error trapping, deferred tax calculations (comprehensive or simple), automatic instalment calculations, daily interest calculations on overpaid and late paid tax and the full range of the CT600 suite of forms. Computations in foreign currencies can also be prepared

The risk module enables a full audit trail, on-screen reviewing using queries within data cells, allows what-if scenarios and track changes and also has a set of schedules for estimating future payments on account required under corporation tax self assessment.

The group module provides an up-to-date tax position for groups of any size, and allows the control of group relief, group payment allocations and advance corporation tax, shadow advance corporation tax, and eligible unrelieved foreign tax surrenders between group members. The module also assists with notional intra-group transfers.

The underlying individual group company computations are updated automatically at the request of the user. The group module's deferred tax schedules summarise the information contained in the individual group companies' computations and calculates the aggregate group tax position.

For data collection, a Taxpack (an Excel workbook) can be produced from within the software. It contains the previous period's tax details for comparisons and once the current period's details are completed (by clients, or other members of staff) this can be imported back into the corporation tax working file, speeding up the whole computation process and ensuring accuracy of data. Comprehensive accounts data transfers from all Sage final accounts packages provide another method of quick, secure data entry.

AutoUpdate allows updates to the software to be downloaded from the Internet On-screen help, guides, newsletters, training seminar programmes and product review groups as well as telephone hotlines are also available.

Sage Corporation Tax (powered by Abacus) Lite module is an entry level version of Sage Corporation Tax (powered by Abacus) Standard package. It is aimed at users with limited corporation tax knowledge and those with large volumes of small, simple returns. Users can generate form CT600, CT600 (Short), and supplementary forms CT600A, C and J plus supporting computations for trading and investment companies. It allows quick and efficient production of high quality output for those returns requiring very little data input and minimal detail. This package also has a comprehensive tracking and administration module and supports online filing and data transfers from all Sage final accounts packages.

Contact Sales team/customer services
Address Sage (UK) Limited, Building 3, Exchange Quay, Salford Quays, Manchester, M5 3ED
Tel 0845 111 11 11
Internet www.sage.co.uk/accountants
Cost Sage Corporation Tax (powered by Abacus) from £199 (including annual licence)
Rec spec Windows

Tax Computer Systems Ltd

Tax Computer Systems Ltd is an independent software company which has been producing its very powerful corporation tax software, Alphatax for 18 years. It is the only company in the UK which specialises in corporation tax software, and many of its employees are qualified corporate tax professionals. The software is used by 23 of the top 25 accountancy firms, and 76% of the top 50 firms, as well as by 750 large companies.

Alphatax is a fully comprehensive package specifically designed for corporation tax self assessment. Operating in a Windows explorer tree environment makes the software straightforward to use. It covers virtually all a company's corporation tax needs, coping with corporation tax back to 1 April 1987, and dealing with practically every aspect of corporation tax that the user could want. It covers compliance, planning and tax accounting, production of the CT600 forms and backing schedules, and copes with trading, investment and property companies, as well as multi-trade companies, investment companies with trades, and divisions and foreign branches. It produces full capital gains tax computations, including wasting assets and leaseholds. Data collection is supported through an optional automated Tax Pack function. Full review functionality is provided including diagnostics, changed values tracking, full audit trail of all updating actions and recording the source of all input data. Management reports can be customised to the precise requirements of clients so that risk factors, client service exposures, and planning opportunities can be monitored. Group relief is catered for and the Group planning function allows flexible management of a large corporate structure. Significant investment has been made to integrate the Group functionality with the main product to ensure that the performance matches that of the main product. In addition, the package deals with tax accounting, and deferred tax in accordance with the Financial Reporting Standard 19 and International Accounting Standard 12 disclosure requirements. The tax and retail prices index tables from Tax Computer Systems' website can be downloaded. The program links electronically to LexisNexis for users who subscribe to that service, giving them instant access to legislation. Returns can be filed by Internet.

Accounts integration is an add-on function that works with any financial system by mapping to any CSV or Excel file output.

Alphatax is available as a standard, full working package with no client number restrictions, and users range from in-house corporate departments to lawyers and to the largest firm of accountants. Four main platforms are available to corporates: Business Entry, Business Group, Business Advanced and Business Corporate. Each platform contains the core Alphatax product and Tax Accounting function, with additional products added on to each platform suiting the needs of the corporate. The program is supplied on CD-ROM, with major releases distributed twice a year (after the Budget and in autumn). Minor updates can be downloaded from the website.

The Alphatax Hosted Service is an Internet service and can be run from any browser. It uses Microsoft SQL technology, and enables users to work off-site. Data can be stored and accessed from a central repository over the Internet or via a company Intranet by accredited users. In addition to firewall protection, the system's data encryption assures users of complete operational security. Access for individuals and departments to data files is controlled in line with pre-agreed authorisation procedures and, similarly, access to computations is restricted to the specific engagement terms and progress stage on a client-by-client basis and by accounting period. The obvious benefit of using the hosted service is that the user has no internal IT costs relating to this aspect of his business.

Alphatax is fully compliant with the new iXBRL standard. The software automatically embeds all relevant XBRL tag names in the tax computation without user intervention. Accordingly the user does not need to have any knowledge or understanding of the iXBRL syntax. Furthermore, there is no requirement for the user to tag any number manually.

Alphatax Enterprise is a client server, the aim being to unite all those involved in the process of corporation tax. All the information relating to all the companies in a corporate group or professional firm client portfolio is stored on a central database, which is an industry standard relational database, Oracle or MS SQL. Different individuals can work on files at various locations, although access can be strictly controlled. Any changes made are automatically updated centrally, so that there are not several versions of the same data at one time. Access can be through a network or over the Internet, the latter making it possible, if wished, for the client and the adviser to have access to the data.

Alphacap allows asset information to be collected, stored and then analysed by the tax professional according to its tax treatment, with a full reconciliation to the source data. Information relevant to the calculations and disclosure in the tax computations can then be passed seamlessly into Alphatax Enterprise. Factors such as chargeable gains and capital allowances are taken into account. It can also help with contingency planning and provisions for deferred tax.

Tax Computer Systems is developing an iXBRL convertor for statutory accounts. The new software application will incorporate the following features:

- convert statutory accounts documents (Word, Excel and PDF) into an iXBRL format;
- automated tagging most of the statutory account numbers;
- compliant with UK GAAP or the IFRS accounting standards and taxonomies;
- user may adopt manual tagging, or override automatically assigned tags.

The application is due for completion mid summer 2010.

Alphapack is a new data collection product which automates and streamlines the process of collecting data from accounting sources using the latest web-based technology. Alphapacks are created automatically from Alphatax computations, refined based on the type of company, and then customised by the tax professional based on the company's information requirements before being made available over the internet to the finance professional.

The software package is installed via a simple download connecting the user to the Alphatax Enterprise database. There is no need for files to be sent over e-mail, instead data is transferred over an encrypted internet connection. Data continuously flows back to the Enterprise database where it is safely stored.

Once the tax professional is satisfied with the quality of the data collected, a single press of a button instantly transfers the Alphapack into the Alphatax computation, ready for review and further work by the tax professional.


How high are your online filing rates?
Ours are pretty impressive
Simple Self Assessment with:
Sage Taxation 2010
sage

The entire process is tracked with a comprehensive audit trail and access to historical and milestone data.

Alphatrac is a global tax management tool which integrates advanced web-based data collection tools with process management functionality. As such it brings high levels of risk management and efficiency into corporate tax processes. It is based on web technology and facilitates a unique level of visibility at all levels within an organisation.

The Alphatrac approach recognises that subsidiaries operating in different tax jurisdictions have different filing and payment deadlines. The corporate centre defines the information to be collected but delegates the sourcing to individual local users. The status of each company's tax filings and payments is always visible and managed as part of the overall group process. The software enables this information to be accessed easily, either through a graphical and easy to understand management dashboard or through more conventional detailed reports. Individual users can focus on the information that is pertinent to them at a particular point, while ensuring that they are always alerted to impending problems and deadlines. It also gives senior management an unparalleled insight into the management of their organisation's tax affairs.

Alphatrac is a web-based system and can be rolled out globally. Tax Computer Systems also offers a hosted solution from a secure location so that organisations can start using Alphatrac within hours of deciding to proceed.

In addition, Tax Computer Systems produces software for life companies; both products integrate seamlessly with Alphatax. Alphalife-EV is a modelling tool aimed at actuaries and projects the tax liability for life companies over five to 50 years. Then there is Alphalife which is a tax engine for life companies dealing with all necessary tax computations. This software has a host of features including tax accounting under IFRS and UK GAAP, I-E computation, unit trust deemed disposals, calculation of s 432A percentages, s 432A allocations of income and gains, and PHI computation.

An online manual and training are supplied with the software. Other support includes online help screens, telephone hotlines, e-mail support, online knowledge base, website, customer user groups, newsletters, and an annual user conference.

Contact	Sales team
Address	Tax Computer Systems Ltd, Centurion House, London Road, Staines, TW18 4AX
Tel	01784 410369
Internet	www.taxcomputersystems.com
Cost	Price on application
Rec spec	Windows 2000 or later; 256mb RAM; 100mb hard disk

THOMSON REUTERS ABACUS

Thomson Reuters – Abacus

Thomson Reuters acquired Abacus from Deloitte in late 2009.

Abacus Enterprise Direct Tax Compliance is a comprehensive package designed to support the full range of computations form the simplest up to the very largest and is used by over 450 companies, including many of the FTSE 100.

The software spans a wide variety of industries, such as property investment, oil, unit trusts and open-ended investment companies, and copes with virtually all aspects of corporation tax, such as research and development tax credit, non-corporate distribution charge, fixed asset reconciliation, multiple trades, investment companies with trading sources, double tax relief optimisation, interest calculations, quarterly payments, interest payments and capital disposals.

The software has a comprehensive group facility which controls group relief and group payment allocations, capital losses, eligible unrelieved foreign tax surrenders between group members, and what-if planning. A set of deferred tax schedules summarises the information contained in the underlying computations and calculates the aggregate group tax position.

Other features include a full audit trail, full automatic recalculation, automatic error trapping and automated cross-referencing of all schedules. The software supports online filing of the corporation tax return and computation.

Abacus Enterprise Direct Tax Compliance provides a controlled approach environment for administration and risk and process management, supporting the heavily regulated tax compliance and reporting processes. All schedules are logically and automatically cross-referenced, removing the possibility of manual error, easing navigation and allowing reviewers to easily identify the source and destination of data.

Abacus provides a familiar spreadsheet user interface and its logical process flow ensures consistent preparation of computations. The product is highly scalable and configurable. To reduce complexity and enhance ease of use, computations only contain the calculations which are relevant to the particular company circumstances. Users can see everything they need on the screen, so they can instantly see and review the computation and the tax return, along with the system calculations and trace back from return to source data.

In addition, users have the flexibility to customise their computations including any of their own working papers to be included in the file and integrated into the submitted return. Transparent logic allows users to see how all the results are derived and to trace numbers back from the return to source.

Training is included for all clients, and the software is fully supported by on-screen and internet help, a knowledge system, newsletters, as well as full telephone and e-mail support.

Abacus supports the current and upcoming e-filing regimes. All computations produced within the product will be fully iXBRL compliant and can be e-filed directly using the software. In addition, it offers full statutory accounts compliance, either through a conversion tool that will enable users to tag Microsoft Word accounts manually or through a full accounts preparation software package that will produce all required documents and reports based on data entry into the software.

In addition, Abacus offers an indirect tax compliance solution. The software links to the source accounting system, producing an automated upload. An automated analysis is then prepared by the reporting engine, reducing manual checks and the risk of errors. The system will produce automatically populated VAT work papers and

VAT returns, enabled for e-filing. The software covers VAT filing across the EU, and can also automate European sales list filing.

Comprehensive risk management processes include protected system formulae and a full audit trail and track changes functionality.

A range of work papers support the return enabling the user to make adjustments to accounting system figures in a systematic and visible way. A number of standard tests provide automated checking of data to help the compliance process. Full prior period and prior year comparative figures are also included, reducing the time spent in subsequent periods, and users can also create bespoke tests on the data captured in the system to deliver reporting specific to their business.

US Compliance for foreign entities software aimed at organisations looking to move towards an electronic filing system. This provides a web-enabled application that mitigates the risk of non-compliance with US withholding documentation requirements, typically forms W-8 and W-9, concerning US source income.

Abacus Enterprise Workflow is an online solution that keeps real-time track of corporate income tax, indirect tax and associated reporting processes across multiple jurisdictions. Compliance processes used by firms across the world have been mapped and embedded, resulting in a central database of rules within Abacus Enterprise Workflow. The status of compliance tasks and their related deadlines are presented in an easy to understand visual format via a web browser, replacing in-house systems. An online filestore provides storage for all returns and supporting documentation holding an easily accessible central repository of information.

Contact	Richard Sampson
Address	Thomson Reuters, Monmouth House, 58-64 City Road, London EC1Y 2AL
Tel	020 7375 6768
Internet	www.abacus.thomsonreuters.com
Cost	price on application
Rec spec	Windows 2000, XP, 2003 Server, Vista, 1Gb RAM

THOMSON REUTERS DIGITA

Thomson Reuters – Digita

Digita Corporation Tax calculates the mainstream corporation tax chargeable, incorporating marginal small companies relief, if applicable, for trading and investment companies. While this software would be unlikely to suit the largest corporates and is not designed with them in mind, it handles the requirements of all but the tiny percentage of corporates with highly complex tax affairs. It applies the correct tax rates applicable to both close investment holding companies and open ended investment companies. The software deals with long accounting periods, automatically apportioning income and expenditure where necessary. It carries out various calculations including research and development tax credit, adjusted profit, expensive car lease restrictions, losses carried forward and TA 1988, s 419 charge for loans to participators. There is also a payment management tool.

With regard to capital allowances, Corporation Tax calculates the allowance and balancing charges for each chargeable period and supports separate capital allowance computations attributable to a Schedule A business, resulting in a completed tax computation and CT600.

Turnover, profit and loss, and balance sheet fixed asset values can be imported from Digita Accounts Production, which can then be used in the deferred tax module which is contained within Corporation Tax to work out the amounts required for provision under Financial Reporting Standard 19.

A group relief module is also available. This allows a group of companies to be linked and displayed in one view, facilitating easy allocation of losses within the group. Each company is automatically updated as required and form CT600C is completed with all relevant details.

Client company files can be exported onto a laptop enabling the user to work at sites other than the office.

The software has a progress lock down feature with automatic update of tracking of relevant filing and processing dates and events. It records the individual who carried out the particular section of work, together with a time and date for each event tracked. The system produces a pdf copy of the computations automatically and saves them for review and onward to completion.

The Online Filing Manager allows for batch filing of forms and computations to the government gateway which can be programmed to run at specific times of the day or night. This feature monitors the submission of data in the background so that users can continue to work on other clients or when absent. The submission progress automatically updates the event and date tracking system.

Digita provides plentiful support, as described in the review in the Personal Tax section of this supplement.

Contact	Karen Gardner
Address	Digita, Liverton Business Park, Exmouth EX8 2NR
Tel	01395 270311
E-mail	karen.gardner@thomsonreuters.com
Internet	www.digita.com
Cost	rice on application
Rec spec	supplied on request

THOMSON REUTERS ONESOURCE TAX PROVISION

Thomson Reuters – ONESOURCE Tax Provision

Thomson Reuters ONESOURCE Tax Provision solution is a suite of configurable web-based tax reporting tools for corporation tax. Used by by approximately 900 corporations worldwide, including the big four and 35% of the Fortune 500, ONESOURCE Tax Provision provides a complete data warehouse for all critical documents needed to support the tax expense calculation, reporting and planning needs of a company. It gives control over tax data collection and user access and also over tax accounting calculations and reporting. It offers minimised reporting risk, by enabling greater scrutiny of tax data accuracy, and corporate efficiency through a streamlined data collection and workflow process including multilevel sign off.

In essence the software allows automation of information from any general ledger, financial reporting or fixed asset software. Data can also be imported and exported from Abacus/Alphatax for compliance purposes.

ONESOURCE Tax Provision includes complete domestic and foreign tax accounting calculations, self-reconciling reports, dynamic review screens, and a simplified web-based tax pack wizard designed to assist non-tax users in the collection of data from foreign and remote locations. Work flow controls and audit trails help to satisfy the requirements of Sarbanes-Oxley and improve internal controls. Features include:

- Full suite of required IAS 12 tax charge reports.
- Current tax and deferred tax reported by current year and prior year.
- Reports at the lower entity, filing group, sub-consolidation, regional, and full group levels.
- Taxes separated by the type of tax on profit such as corporate and trade taxes, as well as the effective tax rate associated with each.
- A robust visibility into all effective tax rate impacting items, including the reason for the impact, and summaries of the tax rate reconciliation.
- A full configurable roll forward of all deferred tax positions, and tracking both of gross and tax-effected values.
- Current tax charge and overall tax charge including changes in deferred taxes per the balance sheet.
- Reports on all unused tax losses globally, as well as any unrecognised values (impairments of deferred tax assets), and rules around use.
- Entity-by-entity views of the detailed tax provisions for current and deferred taxes, and effective tax rate reconciliations.
- Effect of tax rate changes on the deferred tax positions and overall tax rate.
- Automatic revaluations of deferred items in non-reporting currencies due to currency translation adjustments.

A wide range of support is offered including manual, training, online help screens, telephone hotlines, customer website, seminars, and newsletters.

Contact Tim Alexander
Address Thomson Reuters, 58-64 City Road, London EC1Y 2AL
Tel 0207 375 6796
E-mail tim.alexander@thomsonreuters.com
Internet www.onesource.thomsonreuters.co.uk
Cost price on application
Rec spec Windows XP; Pentium 41.5; 768mb RAM; 50mb hard disk space

Employment packages

Suppliers of employment tax packages are numerous, and the following reviews are a selection of just a few available. The suppliers range from one-man bands and niche software companies up to the big four firms of accountants and mainstream software companies. The products accordingly vary in capability: some deal with every aspect of dealing with benefits and expenses removing all the hard work from dealing with forms P11D and related matters, while others are straightforward pay-as-you-earn calculators which tell the employer how much tax and National Insurance should be paid on an employee's salary. Full-scale human resource and payroll software products are not covered in this supplement.

Hessel

Launched in 2009, Hessel provides a software service that tracks and reports the complex tax and benefit trails arising around local and international assignments. Uniquely, specific online portals allow overseas employees, administrators and suppliers to keep all information current. This ease of use leads to increased compliance and reduced cost leakage, which, in turn, results in more timely accurate tax and benefit reporting. The idea is to ensure that everything that should and can be included on the employer's payroll

The data recorded can be sliced to show total expenses paid to individual employees, amounts paid in excess of the statutory limit and the amount of grossed up tax due. Gross-ups can be calculated at marginal rates or by using tax tables. P11D tax reports can show either no gross-up, a fixed rate gross-up or tax table calculation for dealing with those employees whose relocation expenses and benefits move them to a higher rate of tax. In addition the software will produce PAYE settlement agreement reports. But because of the way the data is collected and held, it is much more versatile, for example it is possible to look at suppliers across regions, and negotiate cost and tax savings accordingly.

The open architecture database allows full integration with most other reporting software and to ensure smooth migration, prior to initiation Hessel works closely with clients to process map workflows. The programme is hosted on Hessel servers.

Supportwise users have access to a help desk, website, seminar groups, and an annual client conference at a prestigious location.

Contact Geoff Davidson
Address Hessel, Croham House, Crowborough, East Sussex TN6 1WW
Tel 01892 669901
E-mail geoff.davidson@hessel.co.uk
Internet www.hessel.co.uk
Cost Priced per employee per annum

Keytime

Keytime

Keytime P11D Calculator calculates all taxable benefits, and produces and submits online HMRC standard forms P11D. It is a multi company product and has no limits on numbers of employees. A telephone helpline and online help are available, and the form creator ensures that only the relevant sections of the form for each individual are completed. Plain paper forms can be printed for employees.

Contact Anthony Boggiano
Address Keytime, Pennine House, Denton Lane, Oldham, Lancs OL9 8PU
Tel 0161 484 3500 Fax 0845 456 3104
E-mail info@keytime.co.uk
Internet www.keytime.co.uk
Cost P11D Calculator £160, loyalty discounts for existing customers
Rec spec Windows 7, Vista, XP and 2000; 256/512mb RAM; 0.5/1mb hard disk space

PKF

Accountants & business advisers

PKF

PKF's P11D software uses Microsoft.NET technology and SQL databases to provide reliability, security and scalability for all businesses and professional practices whether they produce 20 P11Ds or tens of thousands.

Integration with common human resource, fleet and accounting systems ensures data only needs to be entered once, and further custom integrations can also be provided.

PKF P11D incorporates a detailed employee advice form in electronic format, which fulfils legal requirements for providing employees with their P11D information, and also explains to employees in detail how benefit values have been calculated. This can be printed, saved as a pdf or e-mailed directly to employees.

Full facilities are provided for online filing. In addition the software provides full calculation of benefit values, live update facility, customisable user permissions and security levels, allowance for partial or full dispensations, PAYE settlement agreements, a fleet management module, and extensive validation of data prior to final output.

Updated annually, PKF P11D allows users to choose which items and employee data to carry forward from year to year, automatically removing employees who have left, or benefits surrendered. The software incorporates additional facilities for firms of accountants to help track progress on each client, and report progress by caseworker.

Used by many of the large firms of accountants as well as by businesses of all sizes, the software is available from PKF or specialist suppliers CCH and Digita.

PKF's P11D software won an Accountancy Age award for its technical superiority, ease of use, high levels of user satisfaction, and innovation of time saving features.

Contact Jennifer Nethersole
Address PKF, Farringdon Place, 20 Farringdon Road, London EC1M 3AP
Tel 0800 100 7113
E-mail p11d@uk.pkf.com
Internet www.pkfp11d.co.uk
Cost From £150
Rec spec Windows 2000 – Vista, 512mb RAM, 200mb hard disk space

PTP Software Ltd

Tax Expense collects and reports benefits and expenses throughout the year for completion of forms P11D. The various related forms, i.e., P9D, P11D, P11D(b) and P46(Car) can be produced. The system distinguishes between taxable and non-taxable expenses, and those covered by dispensations and pay-as-you-earn settlements. It makes the calculations automatically using a database of carbon dioxide emissions by car type. Class 1A National Insurance calculations are also performed. It also deals with s 336 claims, online filing of forms P11D and has the facilities for standard letters and mail merge. Forms can be produced as a pdf for sending to clients.

Two versions of the software are available: one for advisers, which produces the forms only, and one for employers, which can track expenses through the year and then produce the forms.

Contact Sales department
Address PTP Software Ltd, Riding Court House, Riding Court Road, Datchet, Berkshire SL3 9JT
Tel 0844 815 5530
Internet www.ptpsoftware.co.uk
Cost Tax Expense: employers' version – £185 plus VAT to £590 plus VAT;
advisers' version – £130 plus VAT to £405 plus VAT
Rec spec Windows XP; Pentium 4.1; 1gb RAM; 1gb hard disk space

QTAC Payroll Products

QTAC has been developing PAYE software since 1994. One of its handiest products is the tax and National Insurance calculator, QTAXPro. This works out the tax and National Insurance due on a net salary figure using a net or gross salary figure, something which would otherwise be a nightmare task. The user enters the information where indicated, and the software does all the hard work. It handles multiple weeks of pay; contracted in and out National Insurance codes, K tax codes, directors' National Insurance, and has tax and National Insurance contribution tables going back to 2003-04. The user can print a report of the details, or a payslip, and help screens are available at every stage. The software can be customised to take account of up to a hundred additions and deductions.

The product can be downloaded from the website. All that is needed to get the program working is a user pin number, and this is available by calling QTAC Payroll Products. The program is also on CD-ROM. This software is extremely simple to use, and is very good value for money.

In addition, the company produces Payroll Professional, a fully featured, high benefit suite for companies employing 200 to unlimited, and bureaux up to 10,000 employees; Payroll Manager which is a full payroll package (both of these products include the construction industry scheme at no additional cost); Payroll Assistant which is an advanced calculator; and The Payroll Department offers a payroll bureau service. The payroll programs are all HMRC accredited.

Contact Sales
Address QTAC Solutions Ltd, Qtac House, Kingsfield Lane, Longwell Green, Bristol BS30 6DL
Tel 0117 935 3500 **Fax** 0117 935 3545 m
Internet www.qtac.co.uk
Cost From £115 excluding VAT per single user copy, multi user available
Min spec QTAXPro – Windows 95 or higher; IBM compatible PC; 32mb RAM; 15mb hard disk space; other products please enquire

Sage (UK) Limited

Sage 50 P11D covers all aspects of benefits and expenses management, including the production of substitute forms and reports. Tested and approved by Ernst & Young, it handles complex benefits packages. All the required forms and list reports for HMRC submission are produced and can be filed online as required. Information can be carried forward year on year, and details can be added throughout the year.

The software is fast, sophisticated, and all benefits are covered, including company vans, fuel charges and beneficial loans. Features include, easy integration with Microsoft and the award winning Sage 50 Payroll and NI number validation. It is aimed at anyone looking at producing multiple P11Ds and it is fully supported by Sage's technical helpline.

Contact Sales team/customer services
Address Sage (UK) Limited, North Park, Newcastle upon Tyne NE13 9AA
Tel 0191 294 3000
Internet www.sage.co.uk
Cost Sage 50 P11D – from £160 plus VAT;
Rec spec Windows 2000 or above; 1gb RAM; workstation 1gb/server 6gb hard disk space

Taxshield

P11D Manager is a long established P11D package, having been produced since 1997 It deals with HMRC approved forms P11D, P11D(b), P9D, P46 (car) and Class 1A National Insurance reports.

The software calculates Class 1A National Insurance, and contains references to the relevant legislation. A range of benefit calculations are included, such as cars (including calculation of carbon dioxide emissions), vans and fuel, relocation expenses, medical insurance, beneficial loans and living accommodation.

All reports can be filed online.

Data entry uses a navigation panel which helps the user find his way around the package. The relevant data can be transferred from year to year, and information can be entered whenever it is convenient to the individual user. Data can also be imported and transferred from other products via CSV file format to reduce set-up time.

Contact: Anna Walker
Address: Taxshield, 11/12 Hingley Street, Cradley Heath, West Midlands B64 5LA
Tel 0870 609 1918
Internet www.p11d-software.co.uk
Cost price on application
Rec spec (PC)1Gb RAM, 1Gb hard disk space; CD ROM reader; (server) 2Gb of RAM; 1Gb hard disk space

Electronic information

A vast array of electronic information is available to tax advisers. The search facilities are often highly impressive, finding in seconds information that would take considerably longer to find in printed material.

CompuCraft Ltd

TaxHub is an internet-based information service for tax practitioners containing a wealth of varied material including:

- over 200,000 informative summaries of articles from the 50 main tax and accountancy publications including *Taxation*, *TAXline*, *Tax Adviser* and *The Tax Journal*, dated from 1991;
- links to the full text of the journals where available;
- full text indexing to the HMRC guidance manuals, incorporating standardisation of all legislation references;
- a private jottings facility allowing users to add their own material together with links to relevant documents held in-house or on the Internet, providing an immediate means of sharing information throughout the firm;
- a public community area which allows users to publish queries, tax tips or full articles, to add to existing threads or to make direct contact with other users (all items added and all contacts can be anonymous if required);
- instant searching of the HMRC website.
- a new legislation 'search and explore' facility which shows the legislation with all the deletions and insertions highlighted, and also provides facilities to see the material as originally published or in its latest state.

Enquiries are made by entering one or more keywords using a Google-like interface. All queries use two unique features:

- an association table e.g. searching for 'offshore trust' automatically finds references to 'non-resident/offshore/overseas settlement/trust';
- tax-intelligence e.g. searching for 'ICTA 1988 s 556' recognises 'Taxes Act 88 sections 555-557' as a hit!

To complement this excellent tax research tool, CompuCraft this year has a brand new product. Called theManuals, this web-based product (www.taxhub.info/themanuals):

- takes a complete copy of the HMRC guidance manuals every week;
- ensures all legislation references conform to a single standard (as in TaxHub);
- archives and provides access to each week's download;
- allows the user to search or browse through any week's manuals;
- enables rapid comparison between different versions of the same paragraph in a manual;
- provides the same tax-intelligent searching as in TaxHub.

Contact James MacKenzie
Address CompuCraft Ltd, 38 Fir Tree Road, Wolverhampton, West Midlands, WV3 8AN
Tel 01902 342154
E-mail taxhub@compucraft.co.uk
Internet www.taxhub.info
Cost TaxHub – from £200 plus VAT; theManuals – from £200 plus VAT
Rec spec Internet access

Interactive Data

Interactive Data (Europe) Ltd

Securities Taxation Service

With over 40 years experience as a provider of capital gains tax and dividend services, Interactive Data's Securities Taxation Service provides a wealth of securities taxation information. The service comprises a range of invaluable reference tools for tax professionals, providing instant access to the latest data where and when the user needs it.

The following are key features and benefits of Securities Taxation Web:

- services can be customised to meet the user's individual needs;
- regular updates across all services;
- multiple user licenses available;
- no need to store books, set up servers or install updates;
- over 25 years' dividend history;
- hypertext links to view capital histories and name changes.

These services are used by a wide range of taxation and financial professionals to help with capital gains tax calculations, completion of capital gains tax and income tax returns, portfolio management and investment decisions, and tax planning.

Many of the services are also available in CD-ROM and print:

- UK & Irish Capital Gains Tax Service;
- UK Registrars Service;
- UK Exemptions Services;
- UK & Irish Dividend & Interest Service;
- International Dividend & Interest Service.

Contact Interactive Data (Europe) Ltd, Fitzroy House, 13–17 Epworth Street, London EC2A 4DL
Tel 020 7825 8100 Fax 020 7608 2032
E-mail enquiries@interactivedata.com
Internet www.interactivedataclients.com
Cost Dependent on the service and number of modules and licences required

LexisNexis®

Nexis®

Nexis provides tax and accountancy professionals with information on over 46 million companies through a combination of company reports, financial information, market research and news sources from more than 20,000 trusted global sources.

Nexis gives users access to:

- a vast range of company, financial and market reports including Hoovers, Dun & Bradstreet, ICC Directors;
- over 7,000 business and trade publications including *Accountancy Age*, *Journal of Accountancy* and *Tax Adviser*;
- all UK and Irish newspapers, both national and regional broadsheets and tabloids;
- an extensive selection of international and emerging market newspapers, this includes *Le Monde*, *USA Today* and *Die Welt*;
- more than 400 global newswires, websites and more than 2,000 blogs.

Contact Marketing department
Address Halsbury House, 35 Chancery Lane, London, WC2A 1EL
Tel 020 7400 2984
Internet www.lexisnexis.co.uk/nexis
Cost price on application

Tolley®s Library

Tolley's Library allows accountants and tax professionals to find up-to-date information, resources and expert opinion from established names such as Tolley's, Simon's and De Voil alongside all the latest material from HMRC. Everyone in a practice can access the same information at the same time at the click of a mouse. The aim of Tolley's Library is to save users research time, cut costs and boost efficiency.

Users can:

- generate more business, for example, specialist case summaries help users keep track of the Advocate General's opinions, enabling them to drive more business by suggesting VAT reclaims to suitable clients;
- work more efficiently with simple and advanced online searching;
- stay up to date by setting up customised alerts to advise them when there are updates to specific areas of interest;
- save time with instant cross-referencing between commentary, cases, legislation and other legal materials;
- re-trace their steps by using the history section;
- take advantage of the customisable bookshelf allowing them to build their own personalised bookcase of 'must have' information.

Tolley's Library is customisable so that users can pay for what they need: the range of collections makes it possible to select the material that is relevant to them.

Contact Marketing department
Address Halsbury House,
35 Chancery Lane,
London, WC2A 1EL
Tel 020 7400 2984
Cost price on application

Tolley®s Tax Partner

Tolley's Tax Partner provides online access to the experience of LexisNexis's tax experts via checklists, practice notes and audio-visual lectures. Concise practical guidance and checklists can be applied to a wide variety of commercial transactions and client scenarios.

Practitioners will be kept up to date with the latest in the key tax areas, including links to audio-visual current development lectures, which provide information on the latest tax changes.

Tolley's Tax Partner gives users tax expertise at hand, so they can focus on client relationships, fee generation and problem solving. For example, it:

- frees up time and resources to generate higher levels of fee earning work through a structured and practical approach to solving tax queries;
- ensures a thorough and consistent approach to common client transactions to reduce both the user's and the client's risk;
- 24/7 online platform reduces loss of chargeable time;

Contact Marketing department
Address Halsbury House,
35 Chancery Lane,
London, WC2A 1EL
Tel 020 7400 2984
Cost price on application

International tax packages

Various packages can be purchased or subscribed to which provide guidance and tax planning assistance in the international tax arena.

ADP

Automatic Data Processing, Inc (Nasdaq: ADP), with nearly $9 billion in revenue and about 570,000 clients, is one of the world's largest providers of business outsourcing solutions. Leveraging 60 years of experience, ADP offers the widest range of HR, payroll, tax and benefits administration solutions from a single source. ADP's easy-to-use solutions for employers provide excellent value to companies of all types and sizes. ADP is also a leading provider of integrated computing solutions to auto, truck, motorcycle, marine and recreational vehicle dealers throughout the world.

ADP sales and use tax solutions automate sales tax processes by calculating sales and use taxes, populating tax forms, and transferring monies to state and local authorities using ADP's proven money movement capabilities. Solutions include:

- ADP Taxware Enterprise: Integrated tax calculation and compliance solution which automatically calculates taxes for sales, purchases and rentals. It covers all US and Canadian taxes as well as calculations of value added and other consumption taxes for more than 250 countries.
- ADP Sales Tax Service: End-to-end solution that automates a company's entire sales tax process, from tax calculation and forms completion to the transfer of tax monies to state and municipal authorities.
- ADP Sales and Use Tax System: Domestic tax engine that calculates transaction taxes for all US and Canadian companies.
- ADP TaxSolver: A component of Sarbanes-Oxley Section 404 compliance, this is a tax return generation system that processes and converts imported data to generate tax returns automatically.

In addition, ADP produces a number of tax and compliance services aimed easing companies dealing with US-related tax and human resource issues.

Contact Rick Weber
Address One ADP Boulevard,
Roseland, NJ 07068,
United States of America
Tel 001 909-569-7897
E-mail rick_weber@adp.com
Internet www.adp.com
Cost Price on application

LexisNexis – Comtax

Comtax provides the international tax planner with the strategic tools needed to achieve more effective tax planning in a globalising economy. These tools will help make calculations, keep track of changing legislation, and present tax alternatives to management in an easy-to-understand manner.

The software enables users to identify, then investigate all alternative tax planning opportunities, taking into account the specific legislation applying to each country in question. In this way, the system supports the tax planner throughout the process of identifying and evaluating all possible courses of action. It does everything from calculating the possible alternatives, to providing instant access to the specific wording of the applicable tax laws and treaties.

Covering more than 120 countries, all data is updated monthly, i.e. effective tax rates, income situation, international restrictions and policies and special arrangements with governments.

Contact Marketing department
Address Halsbury House,
35 Chancery Lane,
London, WC2A 1EL
Tel 020 7400 2984
Cost price on application

Vertex® Global Tax Solutions Ltd

Vertex Global Tax Solutions Ltd is the UK subsidiary of Vertex Inc., the US provider of enterprise corporate tax automation solutions.

The company offers a software solution, Vertex® Indirect Tax O Series®, which helps businesses manage their VAT and sales tax compliance responsibilities. It analyses the transaction data provided through an interface with an enterprise resource planning or host financial system, recognises the pertinent facts of the transaction, determines which jurisdiction has domain over the transaction, and whether the buyer or seller has to account for VAT or sales tax on the transaction.

The system will then calculate tax based on Vertex-supplied or user-defined rate and rule taxability data, return the tax calculated to the financial application and record the information in an internal database for future use in reports, returns preparation, or audit documentation.

Essentially, the system helps a business manage:

- Indirect tax rate and rule data for EMEA, Asia Pacific and North and South America;
- intra-EU acquisitions and dispatches;
- domestic supplies, imports, and exports;
- simplifications such as triangulation and distance sales;
- global VAT and indirect tax reporting.

Vertex Indirect Tax O Series is accessible via a centralised system which updates and maintains VAT information on a global basis, thus reducing the total cost of ownership. However, the software is available on CD-ROM and some products can be downloaded from the Internet.

A wide range of support is also offered. For example, an online or hard copy manual is supplied, along with training, online help screens, help desk, customer user groups and seminar programmes.

To assist companies with their global tax data and provision needs, Vertex also provides a web-enabled, tax accounting solution with Vertex® Provision Global Tax Office™. This facilitates the annual and interim provision process for large, global organisations.

In addition to their VAT and global provision offerings, Vertex supplies solutions for every major line of business tax including: income tax, sales and consumer use tax returns outsourcing, communications tax, and payroll tax. To further assist specific industries, Vertex has developed specialised solutions for the leasing and retail sectors.

ERP partners include SAP, Oracle, PeopleSoft and JD Edwards.

Contact Alan James
Address Vertex Global Tax Solutions Ltd,
1 Furzeground Way, Stockley Park,
Uxbridge, Middlesex UB11 1EZ
Tel 020 8622 3053
Internet www.vertexgts.co.uk
Cost price on application

Niche packages

4 Eyes Ltd

VAT Property Solutions was developed in 2004 for the construction sector, in response to requests from clients who wanted a solution to enable non-VAT specialists to decide the VAT treatment of a construction or refurbishment project. It is a standalone internet-based product which allows clients and their advisers to identify the VAT implications of a proposed development to ensure VAT compliance and minimise costs. The software will always give a basic VAT summary but will advise where it is appropriate to seek further professional advice.

The system is very simple to use. It is accessed by log-on and password over a secure internet connection, and the user then responds to a series of questions about the project, eg what will be built/repaired or refurbished? what will be done with the finished building? The software works out the VAT treatment, and provides an explanation. Technical jargon is explained, and copies of relevant certificates produced. It has all the relevant forms and can be printed to give an audit trail of the decision making process.

The product has 45 registered users and suitable for any sized business which deals with construction.

The software is maintained and updated centrally to take account of legislative changes, variations in HMRC's policy and tribunal decisions.

Training on the software can be arranged. Additional help comes in the form of a help desk, online knowledge base, tax technical training courses, and an e-mail bulletin service.

Contact Phillip Henwood
Address 4 Eyes Ltd, 29 Dingley Lane, Streatham, London SW16 1AZ
Tel 07793 707 839
Internet www.4eyesltd.co.uk
Cost Free trial then £350 a quarter with support
Rec spec Computer with web browser

BBS Computing Ltd

Tax Tips and Tools has been jointly produced by BBS Computing Ltd and the 2020 Innovation Group for nine years. This practical, easy to use software is a reasonably priced tax toolbox on a CD containing a wide variety of spreadsheet tools, tax marketing tools, letters, and computations highlighting some of the complexities of the UK tax system commonly met by the practitioner.

This year's version, Tax Tips and Tools 2010 is now available. Various updates and enhanced models are available for download from the secure website as and when necessary.

Used by over 1,500 firms, the product has 107 practical tax models including company or own car, should I incorporate?, tax credits calculators, inheritance tax calculators, deferred tax calculators, interactive checklists, payroll calculators, and National Insurance calculators. Newest tools include:

- Dividend taxation
- Change of accounting date
- PAYE late payment penalty calculator

The software includes on screen help buttons and examples and a help desk. Training can also be provided.

Tax Tips and Tools 4 won 'Best tax software' in the LexisNexis Taxation Awards 2005 and has been shortlisted on two other occasions.

The software is also available as LexisNexis Tax Tips and Tools and distributed by LexisNexis.

Contact Kevin Salter
Address BBS Computing Ltd, 30 Bear Street, Barnstaple, Devon EX32 7DD
Tel 01271 375271
Internet www.bbscomputing.co.uk
Cost Tax Tips and Tools 10 – £285 plus VAT; unlimited users per office; discounts apply for multiple offices
Rec spec 100mb hard disk space; Office 2003 or above is required for certain functions

BPP Learning Media

BPP Learning Media has a range of study materials both published and online for various professional taxation examinations, including the CTA, ATT and the FTA associateship exam.

eBooks are available for both the ATT and CTA syllabuses. The benefits in adopting this route, include portability, space saving as well as removing the need to carry heavy text books when moving from location to location.

In addition, BPP Learning Media produces Understand Taxation which is a generic interactive taxation package covering UK personal and business tax. Updated annually, it comprises 22 modules each relating to a different aspect of the UK tax system, eg the personal tax computation, corporation tax, unincorporated business tax losses, self assessment, inheritance tax, tax planning, capital gains tax, and VAT. Each module takes between one and two hours to complete and includes learning objectives. A reporting module shows how the user is progressing through the material. Designed to be straightforward to use, the user works at their own pace, and can stop and start at any time. Manuals or workbooks, and training are not required as each module is self-explanatory. An online calculator, help, glossary, tax tables and RPI table are included. A demonstration module can be downloaded from the website; alternatively a 30-day evaluation can be arranged.

Contact Sue Dexter
Address BPP Learning Media, 1st Floor BPP House, 142-144 Uxbridge Road, London W12 8AA
Tel 020 8740 2305
E-mail Suedexter@bpp.com
Internet www.bpp.com/learningmedia
Cost Contact Customer Services on 0845 075 1100
Rec spec Windows 98 and above; Pentium III; 64mb RAM; 45mb hard disk space per title

£* Finansol Ltd Tax Calculators

Finansol Tax Calculators specialises in tax software to assist with tax related decisions. It has provided tax software that is accurate and easy to use to owner managed businesses and advisers for over ten years.

The Incorporation Calculator compares the tax bill as a self employed worker to the predicted tax bill with a company. It produces, for any earnings level, a detailed breakdown of all taxes incurred under each scenario, calculating the maximum dividend that could be extracted after corporation tax and any tax saving. It includes all the effects of the new 50% income tax, 42.5% dividend tax and personal allowance restrictions on earnings, salary or dividend.

The Advance Incorporation Calculator helps assess incorporation as a long term decision for businesses, taking into account the effects of future tax rates on the incorporation decision. This calculator takes full account of the latest additional tax rates and personal allowance restriction; from 2010/11, it includes all effects of the increasing corporation tax, Class 1 and Class 4 National Insurance rates on earnings, salary or dividend.

The Salary v Dividends Calculator finds the most tax effective combination of salary and dividends to extract from a company. It produces, for any level of company earnings, and for unlimited combinations of salary, dividend or retained profits, a detailed breakdown of all taxes and profits remaining. All the latest tax rates and the effect of the new personal allowance restriction on taxable salary or dividend are catered for.

All calculators print accurate and clear reports for clients. Comparison functions and print options have been further improved this year. New products are planned in the near future.

Contact Finansol Ltd
E-mail tax@finansol.co.uk
Internet www.finansol.co.uk
Cost Incorporation Calculator – £25; Advance Incorporation Calculator – £49; Salary v Dividends Calculator – £49; Advance Incorporation Calculator and Salary v Dividends Calculator – £89
Rec spec Any, programs take minimal disk space

LexisNexis® KYC ID

KYC ID from LexisNexis aims to protect organisations from increased exposure to the criminal and financial risks associated with the anti-money laundering regulations and protect their reputation. Using this money laundering compliance tool, organisations can meet regulatory requirements of the ICAEW and every accounting body in the UK and Ireland with the minimum of effort.

This tool allows small and mid-market accountancy firms to conduct money laundering checks on UK individuals and companies online. Customers gain access to the service through a single search screen. Checks can be performed when taking on new or renewing existing client relationships. KYC ID offers users:

- individual checks with the GB URUTM ID verification service, electoral roll, DVLA, passports, utility company databases, politically exposed persons;
- company, director profiles of all UK and Ireland public and private companies and their directors from ICC;
- sanction checks – all key UK and global lists including: Bank of England, OFAC, EU, Interpol and FBI;
- negative news checks – extensive news content from UK and Ireland newspapers, trade press and newswires – updated daily with a 30-year archive;
- audit trail – the results are saved with a summary that is time and date stamped.

Contact Marketing department
Address Halsbury House, 35 Chancery Lane, London, WC2A 1EL
Tel 020 7400 2984
Internet www.lexisnexis.co.uk/kycid
Cost price on application

LexisNexis® Tax Webinars

LexisNexis Tax Webinars are one-hour lunchtime, live audio-visual broadcasts, designed to keep tax practitioners up to date with the latest tax developments, across a wide range of areas, including topical capital gains tax issues, HMRC powers, international tax, employment tax, tax risk, property taxation and family office wealth management.

The webinars deliver expert training at the user's desk at a time that suits him. They are interactive: speakers provide answers to questions during the live broadcasts. The material can be revisited for at least 12 months after the event. Presentations and podcasts, as well as relevant case reports taken from Tolley's Library, can be downloaded.

Contact Marketing department
Address Halsbury House, 35 Chancery Lane, London, WC2A 1EL
Tel 020 7400 2984
Cost price on application

Tolley® Seminars Online

Available on CD-ROM or online, Tolley Seminars Online is an effective way of keeping up to date with tax and accounting changes. The service features audio-visual seminars on the latest changes from some of the leading lecturers.

The 15-minute seminars are cross-referenced to comprehensive notes to provide a powerful commentary package. Other features include:

- monthly updates on key changes in personal and business tax by leading lecturers;
- quarterly updates on the latest changes in accounting and auditing standards;
- audio-visual seminars that can be paused, replayed, or fast-forwarded as often as required;
- a CPD certificate with each seminar;
- MP3 lectures which be downloaded and listened to on the move;
- interactive tests at the end of each seminar.

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Cost price on application

Sensatus

Sensatus is a web software house which develops sophisticated web-based portfolio management software for private investors and investment clubs. This is available to license to accountancy firms under affiliate reseller agreements, multi-licence arrangements or own brand white-label solutions. The web-tools enable clients to see a consolidated view of their investments and update and manage their portfolios online at any time.

Timetotrade provides detailed portfolio analysis, taxation and performance reports using a variety of metrics; and clients are able to view real time their capital gains tax liabilities relating to their investment transactions in shares and funds and use the system to generate HRMC tax return forms 185(new) and SA108, including detailed supporting calculations.

Both pre and post 2008 capital gains share identification tax rules are supported. There is also added support for an extensive range of share reorganisations, plus the ability to generate detailed supporting calculations for inclusion with HMRC capital gains tax submissions. Capital gains tax for unit trust and OEICs fund transactions including equalisation payments and notional distributions are also supported. The computations also support an extended range of investment types and work on providing taxation support for currency trading (Forex) and derivative investment products that include options, warrants, and contracts for difference is being finalised.

Timetotrade is a web based solution implemented using a MySQL database. The user database information is stored within a single central database schema and replicated to an offsite facility to prevent loss or data and business continuity.

The user can generate historical tax returns by adjusting the year end dates and therefore view liabilities relating to different periods of ownership; for example a user can view their tax liabilities for the year ending 5 April 2008 including the share identification rules, indexation and taper relief for that period, then adjust the end date to year end 2009 and the related cost from the old rules are carried forward with the new rules applied to any disposals within that 2008-09 tax year. Historical tax return forms are also available based on the selected year end.

The solution is based on an ASP model with the application hosted in a secure data centre and access available through any web enabled device such as a PC web-browser or mobile device such as an iPhone.

Website updates are performed monthly; it is consistently updated as rules and new products become available

An online manual is available and training, where convenient to the user, is supplied with the software at no extra cost. Other help comes in the form of online help screens, help desk/telephone hot-lines, customer website, online knowledge base, e-mail bulletin service, newsletters, seminar programmes and monthly web seminars.

The service is suitable for a wide range of users from sole practitioner to large firms, as well as non-tax professionals and private investors and investment clubs.

The timetotrade software is a web-based solution that is hosted on remote servers in a secure data centre. Client data can be readily imported / exported into the system. The tools can be integrated into firms' own websites and data exchanged between existing in-house systems either automatically via a secure API interface or manual data up/download. The integrated white-labelled solution enables clients to login to the firms' existing website, view and update their investment portfolios, monitor performance, financial news, stock charts and view CGT liabilities on line at any time.

Contact	info@sensatus.com
Address	Sensatus UK Ltd, 9 Marine Square, Brighton BN2 1DN
Tel	01273 624333
Internet	www.timetotrade.eu
Cost	Investment Club: £99 a year; Individual Investor £199 a year
Rec spec	Windows, MAC, UNIX, LINUX; any modern PC, laptop or mobile web enabled device

Index

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