

YOUR TAX HELP

Accountants.

STANMORE · HMRC-REGISTERED · CO. NO. 11768756

THE SWITCHING PACK

Move accountants in 7 days. We do the heavy lifting.

The number one reason UK Ltd directors stay with an underperforming accountant: they think switching is complex and time-consuming. It is not. Under the UK accountancy profession's standard handover practice, almost all of the handover work falls on us (the new accountant) — not you. This pack shows exactly how the 7 days play out and the only short note you have to sign.

"7 days, three signatures, one call. That's the whole list of things I had to do." — what most of our switchers tell us afterwards.

The 7-day timeline — who does what

Day 0	You	You comment SWITCH on Instagram or book the 15-min call. We have a brief chat to make sure we're a good fit.
Day 1	Your Tax Help	We send you three short documents to sign electronically: (1) a letter of engagement, (2) HMRC Form 64-8 agent authority, (3) a brief consent note for you to forward to your current accountant. Total signing time: under 5 minutes.
Day 2	Your Tax Help	We file the 64-8 with HMRC (which transfers your HMRC agent over to us) and we send the formal Professional Enquiry letter to your outgoing accountant — requesting the handover pack under standard UK professional handover practice.
Day 3-5	Outgoing acc.	Your outgoing accountant responds to us directly with the full handover pack: filed accounts, tax

		returns, payroll records, etc. They are required by their professional code to cooperate. We chase if they are slow — you do not have to.
Day 6	Your Tax Help	We review the handover pack against your last filings and identify anything missed or sub-optimal (wrong VAT scheme, unclaimed allowances, dividend / salary mix, etc.). We prepare your switch summary.
Day 7	You + us	First call. We walk you through what we found, agree the next 12 months, and you are officially switched. No HMRC paperwork ends up on you.

What you actually have to do (the entire list)

- Sign three short documents on Day 1 — engagement letter, HMRC Form 64-8, and a brief consent note to forward to your current accountant. About 5 minutes total.
- Show up for a 30-minute first call on Day 7.

That is it. We file with HMRC, we send the formal letter to your outgoing accountant, we chase if they are slow, we review the handover, we prepare your plan. You sign three things and turn up for one meeting.

PAGE 2 — THE ONE NOTE YOU SEND TO YOUR CURRENT ACCOUNTANT

The short consent note.

This is the only thing you write yourself. It is a polite, brief notice giving your outgoing accountant written consent to release information to us. We send the actual records-request (the "Professional Enquiry letter") to them ourselves — under the standard UK professional handover practice, that is the new accountant's job, not yours.

Tip: send it on a weekday morning, BCC info@yourtaxhelp.co.uk so we know it has gone out. Replies happen within 48 hours when you do.

Subject: Change of accountant — [Your Company Name] (Co. No. [number])

Dear [Accountant's name],

Thank you for your work on our affairs to date.

This is to formally notify you that, with effect from today, we are appointing Your Tax Help Accountants (Companies House No. 11768756, based in Stanmore HA7) as our new accountants for company tax, payroll and bookkeeping matters.

I hereby give you my written authority to communicate freely and directly with Your Tax Help Accountants in respect of our affairs, and to provide them with the standard professional handover pack on request, in line with the standard UK professional handover practice.

They will be in touch with you directly via info@yourtaxhelp.co.uk to request our records and clarify any outstanding matters. Please liaise with them rather than with me on the handover detail.

Many thanks for your assistance.

Kind regards,

[Your name]

[Director, [Your Company Name]]

[Your phone] · [Your email]

BCC: info@yourtaxhelp.co.uk

That is the entire letter from you. 8 short paragraphs. The detailed records request, the chasing, and the handover review all happen between us and your outgoing accountant — without you in the middle.

PAGE 3 – THE HANDOVER PACK (WHAT WE WILL BE REQUESTING)

What we ask your outgoing accountant to send us.

You do not need to chase any of this — this is the list we work from. It is here so you can see what is being requested, what is being moved over, and what we will be reviewing on your behalf before the Day 7 call.

Year-end accounts

- Last 3 years' filed statutory accounts (signed copies, plus working papers)
- Trial balance and general ledger as at the most recent year-end
- Director loan account ledger — movements and year-end balance
- Capital allowances pool position — main pool, special-rate pool, AIA history

Corporation Tax

- Last filed CT600 + supporting computations
- Your corporation tax UTR and details of any HMRC enquiries on file
- History of R&D, Patent Box, or creative-industries claims (if any)

VAT (if registered)

- Last 4 quarters' filed VAT returns and workings
- Confirmation of which VAT scheme (standard / flat-rate / cash / annual)
- MTD-for-VAT bridging software details, if used

Payroll and PAYE

- Last filed FPS / EPS submissions and year-end totals
- Current PAYE / NIC tax codes and any P11D / benefits-in-kind history
- Pension / NEST file if running auto-enrolment

Self-assessment (directors)

- Last 2 years' filed SA returns
- Pension contribution records with carry-forward calculations
- Dividend register and copies of dividend vouchers issued

HMRC and Companies House

- Any open HMRC correspondence (compliance checks, debt management, time-to-pay arrangements)
- Last filed Companies House confirmation statement and PSC register status
- Existing 64-8 agent authorisation — to be replaced by ours during the handover

Bookkeeping access

- Transfer of login or accountant access for Xero / QuickBooks / FreeAgent / Sage (whichever you use)
- Status of bank-feed reconciliations as at the handover date

Missing anything when it arrives? You don't have to chase — we do. Most handovers complete inside 7 working days. Record set by one of our clients is 36 hours from authorisation to fully-switched.

Ready to switch?

yourtaxhelp.co.uk/instagram

Or comment SWITCH on any of our Instagram posts (@yourtaxhelp) and we'll DM the next step.