



# Datamatics Business Solution's Personal Tax Preparation for

UK Chartered Accounting Firm Helps Them Achieve A Productive Tax Season

## About the Client:

*Our client is a leading independent Chartered Accountant based in the UK with multiple offices in London and the Home Counties. The client specializes in delivering advisory and accounting support to individuals and businesses, including small family enterprises to large international corporations.*

## Industry Focus:

*Finance and Accounting*

## Geography Focus:

*UK*

## Overview:

As a leading independent Chartered Accountant, our client was faced with vast volumes of tax preparation requests from their clients. The vast volume combined with maintaining the accuracy of tax preparation and quick turnaround time proved challenging. Our client needed a proficient tax preparation service provider with expertise in the UK personal tax processing to overcome those challenges.

## Objective:

The objective of the engagement was to help the client efficiently manage higher tax return volumes. The client sought scalability, efficiency, accuracy, and quick TAT with the engagement.

## Business Challenges:

*The business challenges that our team of tax preparation experts faced include:*



Understand Tax Laws and Regulations of UK



Large volumes of tax returns



Diverse nature of tax preparation including

- Individuals
- Partnership
- Non-resident Corporate & trusts (SA100, SA 700, SA800, and SA900)



Maintaining cost efficiency and accuracy



Scalability



Quick turnaround times (TAT)

## Datamatics Solution:

*The solution we offered included:*



A team of UK tax experts to process and Quality Check the Tax Returns



A dedicated manager, duly trained in a UK CA firm, was deployed for efficient processing and adhering to UK Tax Laws



Exhaustive checklists were set up and Tax Reconciliations provided as part of output to ensure accuracy



Workflow, communication protocols and feedback mechanisms were set up



Returns processed on client remote desktop, thus securing the confidential Tax payer data



Weekly status and timesheets updated to ensure transparency of work status



Use of Client Database Management system, to reduce admin time involved in transmitting information



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### About Datamatics Business Solutions Limited (DBSL)

Datamatics Business Solutions is a technology-driven outsourcing partner for leading global enterprises. With our technology enabled CPA services, we help CPA firms achieve their business goals with absolute ease.

With a perfect balance of a highly scalable and secure ecosystem comprising of some of the most acclaimed accounting & ERP software and human ingenuity to go with, we have been able to retain 100% of our client in over a decade of our operations.

[www.datamaticsbpm.com](http://www.datamaticsbpm.com)

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## Business Gains:

*With our solution the client was able to achieve:*



Substantial cost savings as client no longer had to carry large staff round the year



Client could focus on Tax Planning, Client relations and other Core activities



Smooth and Undisturbed Flow of Work unimpacted by leaves or attrition at client end



Quick Turnaround Times



Ability to scale the operation up or down

## Key benefits:

The Client was able to process on large volumes of Tax Returns year-on-year without additional resources and meet the Tax deadlines in a cost-efficient manner.