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Sage Taxation Software

The definitive suite of flexible taxation software

Sage Taxation software is a byword for reliability. In fact, Sage's online filing success rate for individuals' Self Assessment returns stands at 99.5%*, and for trust returns the figure is 99.6%* – success rates which are better than the HMRC's own online filing!

We have created an inherently flexible suite of software with a range of solutions to meet the needs of all kinds of practice.

*Figure correct at 31st December 2008.

Here to help whenever you need us

A dedicated support team is here to help from the start. Whenever you need help or advice our experts are on call to assist.

The annual license includes:

- All product upgrades and compliance updates.
- Full access to technical support via a dedicated telephone helpdesk (Mon-Fri 9.00am-6.00pm).
- Web support 365 days a year, which includes access to frequently asked questions and Ask Sage.
- Regular RSS feeds including hints and tips and HMRC updates.

We also offer on-site implementation and a variety of training options – everything you need to get the most from the system.

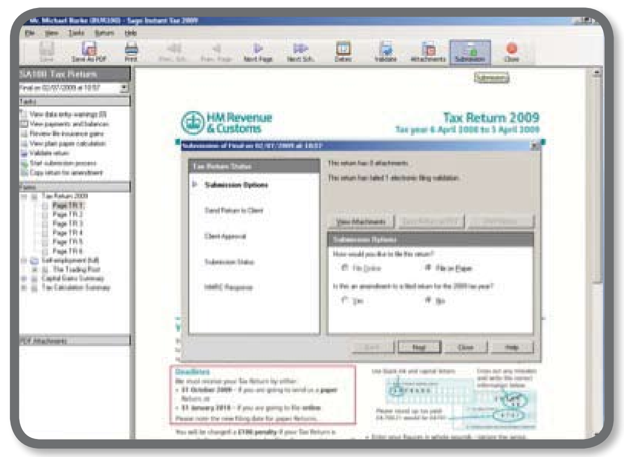
"I have been using Sage Taxation for online filing for the past five years during which time it has achieved a near-perfect success rate first time."

Paul Clark,
Paul Clark Accountants

Sage Instant Taxation

Sage Instant Taxation is the recommended option for sole practitioners with up to 100 personal tax clients. You can complete and file online or on paper SA100 tax returns for individuals using the same technology and validations contained within Sage Taxation. So now Sage's unrivalled online filing performance is available to practices of all sizes.

- Extremely cost effective – Sage Instant Taxation has no initial fee and annual fees start from as little as £99 for 10 clients.
- Future-proof your software with the option to upgrade to Sage Taxation as your practice grows.
- High performance validation checks dramatically reduce errors, ensuring consistent, right-first-time online filing.
- The module produces the full range of SA100 forms and the R40, plus backing schedules and a detailed tax computation.
- Sage Instant Taxation integrates with Sage accounts production software, so data can be imported with no need for laborious re-keying.
- When data needs to be keyed, the user interface is intuitive, so the task is performed quickly and efficiently.



Sage Taxation (Personal Tax, Business Tax, Partnership Tax and Trust Tax)

Sage Personal Tax

Sage Personal Tax takes the hassle out of preparing tax returns for individuals, without compromising on accuracy. Its clear screens, easy-to-navigate pages and simple data entry points provide a common sense approach that helps you get the job done, quickly and easily.

- Integrates with your existing Sage Practice Suite software, reducing the need for re-keying and the potential for errors.
- Clear navigation and comprehensive help function ensure efficient data entry.
- Validation of tax return data provides assurance that returns filed online can be processed by HMRC and minimises rejection of submissions.
- Standard letters can be easily customised and produced for individual or a range of clients.
- Annual processing log tracks tax return progress through the tax year, identifying deadlines and key milestones.
- Imports standard accounts data from Sage accounts production software.

Securities Database

Designed to save you even more time and trouble, Sage Personal Tax includes a database of dividends from UK quoted companies. This automatically calculates the dividend entries to be included in the tax return, based on the shareholding information entered for the client, making it easy to calculate dividend and tax credit entries for inclusion on the tax return.

- No need for time-consuming research of dividend payments for each shareholding.
- Eliminates the expense of holding dividend reference manuals.

To find out more, call our sales team on **0845 111 11 11**

or e-mail us:
accountant.sales@sage.com

*Figure correct at 31st December 2008.

Sage Business Tax

The Sage principle of flexibility really comes into its own with Business Tax, which helps with the preparation of the tax affairs of sole traders and partnerships. From the most basic calculations to complex issues such as a change of accounting date or allocation of partners' profit sharing ratios, Sage Business Tax takes care of it.

- Accounts information can be entered manually or imported from all Sage accounts production software.
- Automatically determines the basis periods for accounting periods and allocates the adjusted profit or loss, including commencement and cessation periods.
- Automatically calculates overlap profits saving time and improving accuracy.
- Includes Partner profit sharing ratio calculations.
- Comprehensive reporting by assessment year and/or accounting periods.
- Posts data to Sage Partnership Tax or Sage Personal Tax, as appropriate, minimising re-keying and the risk of errors.

Sage Partnership Tax

- Draws data from Sage Business Tax and Sage accounts production software to eliminate the hassle of re-keying.
- Profit sharing ratios are auto populated from Business Tax or can be manually added and amended.
- Produces the Partnership tax return and supporting supplementary pages.
- Validation of partnership tax return data provides assurance that returns filed online can be processed by HMRC and minimises rejection of submissions.

Sage Trust Tax

Sage Trust Tax allows you to maximise efficiency and ensure compliance. The module makes it simple to complete all schedules in the SA900 trust return range.

- Dependability is underlined by an online filing success rate of 99.6%*.
- Simple in-form data entry makes it quick and easy to prepare and file all SA900 trust forms.
- Shares the same step-by-step workflow built in to the tax return viewer as Sage Personal Tax and Sage Partnership Tax. The process makes for a logical, cover-all approach to trust return preparation and calculation.
- The complex trust tax calculation is automatically included for all cases, increasing efficiency when dealing with trust returns.

Sage Corporation Tax (powered by Abacus)

Corporation tax calculations can really eat into your working time, with varying issues, complexities and needs arising from different clients. Sage Corporation Tax is available with a number of modules so that you can choose the solution and level of specialist functionality that best matches your needs.

Whichever modules you choose, you get all these features and benefits:

- Pre-submission validations plus HMRC's own validations provide high online filing success rates.
- Full automatic cross referencing between schedules.
- Flexibility and scalability built-in, to allow software to grow and adapt in line with your practice.
- Software can be populated with data from Sage accounts production software, simultaneously saving time and improving accuracy.
- With Sage Tracker, interrogate tax data, customise management reports and tailor deadline reports.
- Powered by Abacus – the system used by many FTSE 100, 250 and 350 companies.

To find out more, call our sales team on **0845 111 11 11**
or e-mail us:
accountant.sales@sage.com

Lite module

The Lite module is suitable for most simple and straightforward UK corporation tax computations.

- Wizards allowing you to choose which schedules and forms to create for new clients including CT600, CT600 (Short), CT600A, CT600C, CT600J and supporting schedules.
- Covers the most common capital allowances areas.
- Create basic chargeable gains schedules.
- Fast and intuitive data entry options covering most common tax situations.

Standard module

The Standard module extends your capabilities into other more complex areas, which may be encountered with bigger corporate clients.

- Choice of single trade, multi-trade and investment companies.
- Unlimited levels of supporting analysis.
- Long funding operating leases for lessee adjustment.
- Create all the CT600 suite of forms (except CT600B and CT600F).

Advanced module

The Advanced module delivers a large number of additional schedules:

- Chargeable gains: part disposals of assets held on or acquired after 31 March 1982, pre 1965 assets, share pools, wasting assets, DTR on gains and other less common requirements.
- International schedules: EUFT calculations/mixer schedules, on share pooling, CFC schedules (plus CT600B), CT600F, foreign exchange differences and foreign currency handling.
- Additional capital allowances schedules.
- UK GAAP/IFRS compliance.

Deferred Tax module

Links in to all relevant standard computation schedules to provide full functionality around deferred tax including:

- Reconciliation of the tax charge.
- Short-term and fixed asset timing differences.
- Reconciliation of movement on fixed assets.
- FRS19 compliance.

Group module

The Group module allows group files to be created, to which individual company files are linked. These are updated for any group relief and other entries made in the group file.

- Deals with group relief and consortium relief.
- Supports non-coterminous periods.
- Links to the Deferred Tax module (when activated) to provide group deferred tax position and FRS19 disclosure.
- Supports simplified arrangements and group payment allocations.

Risk module

The Risk module allows the practice to maintain a full record of who has been involved in preparing and changing the Corporation Tax return and computation.

- Full audit trail, with options to highlight all changed cells and to track and report on all changes.
- Creation of 'what-if' scenarios to review alternative outcomes.
- Notes, queries and reminders can be entered along with sources of each number on the screen, to provide comprehensive backup for the return and computation.