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Making Tax Digital for Income Tax

# Accountant Survival Playbook

A practical guide to managing MTD IT compliance for clients with straightforward tax affairs; without the extra work

**TaxNav. You're sorted.**



# MTD IT is changing how you support your clients

Making Tax Digital for Income Tax (MTD IT) is more than a new filing requirement. It changes how accountants support sole traders and those with property income, particularly if they're not using bookkeeping software.

For many accountants, supporting these types of clients has long been a viable model: simple affairs, limited contact, efficient delivery and sustainable margins.

MTD IT introduces more frequent reporting to HMRC and a greater need for digital records.

As a result, firms could find themselves doing more work, increasing fees, or reconsidering how they support these clients.

**But what if there were a smarter model for serving them profitably?**

## The client mix conundrum

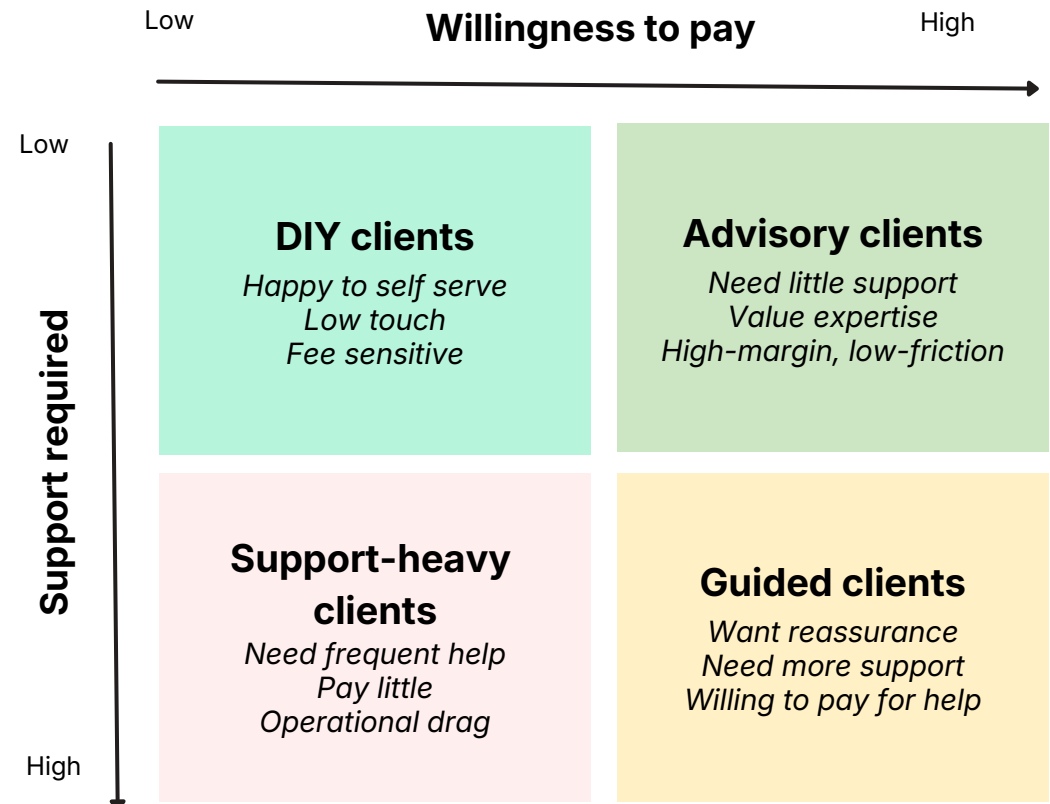
# Different clients, different needs

Self-employed individuals and property income recipients who don't use bookkeeping software are far from a uniform client group.

Their habits, expectations and levels of engagement vary widely, as does their willingness to pay for accounting support.

**TaxNav can help you support them all.**

TaxNav client management matrix for your clients



## A smarter approach to MTD IT client management

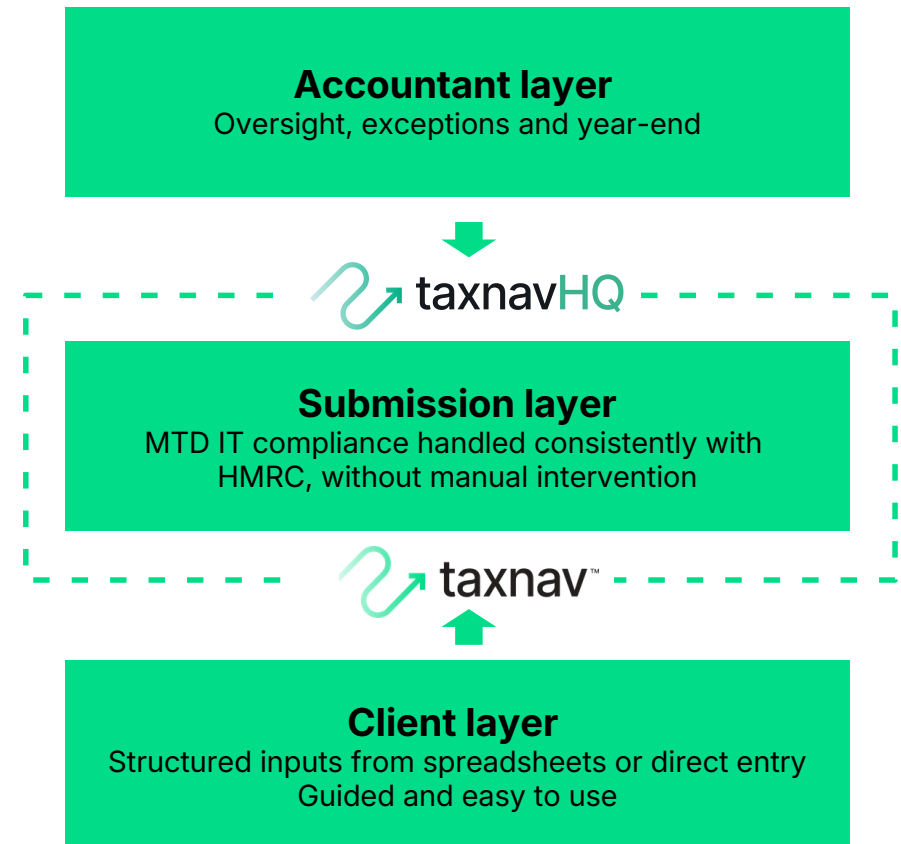
In this new MTD IT world, accountants are adapting how they support this client group.

MTD IT has changed the process, requiring quarterly income and expense updates to be submitted to HMRC using approved software or tools.

This 'submission layer' introduces a new step and requires a decision: will you take responsibility for it, or will your clients?

TaxNav software helps guide clients through MTD IT submissions without adding unnecessary time or cost to your practice.

**TaxNavHQ provides the control and visibility you need to maintain the relationship.**



## TaxNav allows you to support each client segment effectively

### DIY clients

Light support, efficient to manage

#### Client need

Happy with a self-serve MTD IT approach, with accountant oversight where needed.

#### How TaxNav helps you

TaxNav helps them stay on top of digital record-keeping and quarterly obligations, while you retain visibility and control through TaxNavHQ.

#### How to position to your client

*"We're introducing TaxNav to make MTD IT easier and more convenient for you, without adding extra admin.*

*You'll be able to keep on top of your quarterly updates in a straightforward way, while we continue to oversee things in the background."*

### Advisory clients

High value, advice-led

Open to additional services that add value, with a focus on insight and support rather than process.

Maintain a low-touch compliance model, while strengthening the relationship through oversight, reassurance and higher-value advisory support.

*"We're using TaxNav to make MTD IT reporting smoother and more efficient, while keeping our focus on supporting you with advice rather than admin.*

*Behind the scenes, we'll continue to oversee everything to ensure accuracy, so we can spend more time helping you make informed financial decisions."*

## TaxNav allows you to support each client segment effectively

### Support-heavy clients

Higher support needs, more hands-on

Require more support than a traditional low-touch model comfortably allows.

TaxNav's simple software helps move these clients towards more structured, digital ways of working. Automation features reduce the day-to-day burden on your team.

*"TaxNav gives you a simpler starting point for managing MTD IT.*

*We'll still be there to support you, but with a process that is clearer and less time-consuming.*

*We can also help you move towards digital record-keeping using spreadsheets or other simple tools."*

### Guided clients

Value support and are willing to pay for it

Value reassurance, with accountant oversight and support where needed.

TaxNavHQ helps you deliver that support efficiently, while ensuring everything stays accurate and submissions stay on track.

*"TaxNav is designed to make MTD IT easier for you, with our support still built in.*

*You'll still have a well-supported client experience, while we use TaxNavHQ to review, guide and keep everything on track."*

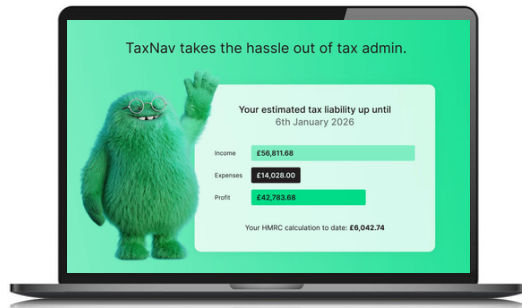
#### Client need

#### How TaxNav helps you

#### How to position to your client

# Guided MTD IT submissions for your clients. Control for accountants.

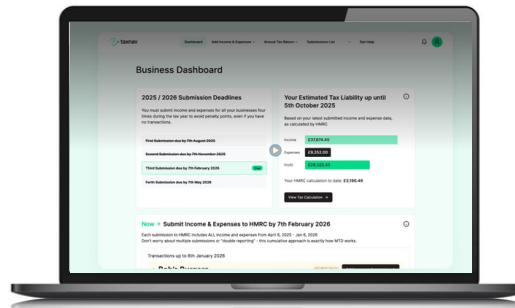
**1** Client signs up with the support of Navi – our friendly AI assistant



Client creates an account, connects to HMRC Gateway and uses TaxNav to enter income and expenses through connecting their existing spreadsheet, direct entry, TaxNav's import tools or bookkeeping app. TaxNav also supports Excel.

**Onboarding and training is supported by Navi.**

**2** Quarterly and year-end submissions, with guidance when needed



**TaxNav** summarises income and expenses for each quarter.

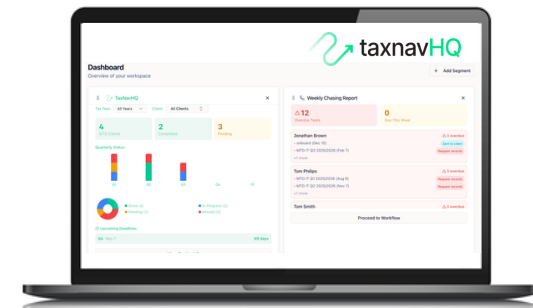
Clients can review figures or share them with you, with an estimated tax position shown in real time.

Clients receive automatic reminders to keep everything up to date.

Submissions are handled by our software in a structured, automated way, helping avoid missed deadlines and penalties.

**Any issues are supported by our human and AI support team when needed.**

**3** You stay in control and maintain oversight and duty of care



**TaxNavHQ** gives you a clear view of your clients' quarterly submissions, so you can review alongside their spreadsheets or income and expense records.

You can step in where needed, taking control of quarterly or annual submissions when appropriate.



Reduce the workload. Navi is your client's friendly AI assistant

## Navi makes MTD IT simple

Navi helps self-employed clients and those with property income become more self-sufficient, guiding them so you don't have to support every step of the way.

**Guided onboarding &  
HMRC set-up**

**Personalised prompts  
& reminders**

**AI-assisted  
expense capture**

**Automated submissions  
to help avoid  
missed deadlines**

**Always-on support  
& troubleshooting**

**Handles multiple  
income sources,  
including property**



## Two different models to help you build or evolve your MTD IT offering around your business and clients

### TaxNav referral

#### How it works

- Client purchases a TaxNav licence (£60+VAT pa or £6+VAT pm)
- Client completes onboarding with support from Navi, enabling MTD IT quarterly submissions
- You connect the client to your TaxNavHQ for compliance oversight

#### Benefit to you

- Retain the client relationship without creating additional software or support overheads

### TaxNav reseller

#### How it works

- You purchase TaxNav licences (volume discounts apply) and include them within your client MTD IT offering
- Client registers with TaxNav using a unique code and completes onboarding with support from Navi
- You use TaxNavHQ to support MTD IT compliance
- You charge for software and services as part of your overall fees

#### Benefit to you

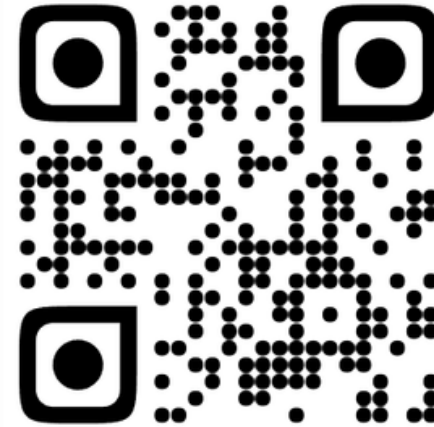
- Bundle and price your MTD IT offering alongside advisory services
- Submission support and prompts are provided by TaxNav, reducing the burden on your team

## Become a TaxNav Navigator Partner



Join the growing number of accounting practices, large and small, choosing TaxNav as their solution for clients who need a simple, low-cost way to stay compliant with MTD IT.

TaxNav Navigator Partners receive team training, access to our support team, and early access to TaxNavHQ features and updates.



**Register your interest at [taxnav.digital/accountants](https://taxnav.digital/accountants) and get access to:**

- Become a TaxNav Navigator
- The TaxNavHQ demo
- TaxNav Accountant Profitability Calculator
- Latest pricing and offers
- Client sales materials
- Access to our accountant community and best practice insights



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