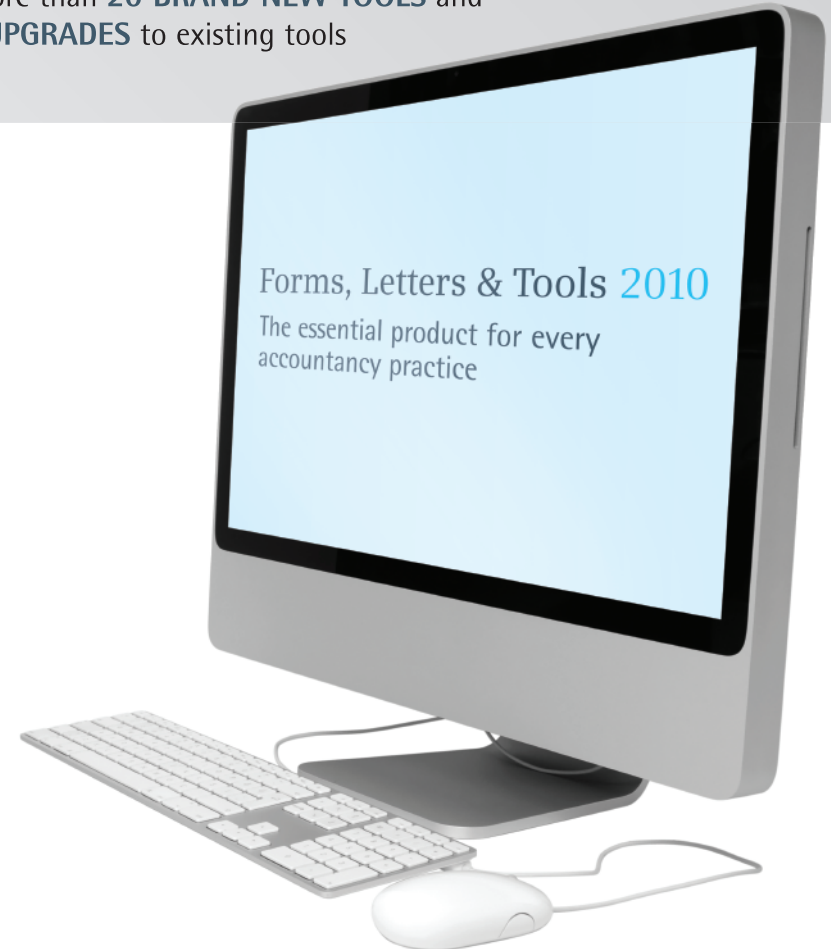


Forms, Letters & Tools 2010

A comprehensive collection of useful forms and letters that every practitioner needs



Upgraded for 2010, Forms, Letters & Tools includes more than 20 BRAND NEW TOOLS and OVER 90 UPGRADES to existing tools



2020 Group

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The 2020 Group is the UK's largest voluntary membership organisation for professionals who are committed to growth. 2020 Members are looking for additional revenue streams while still offering traditional services.

2020 Membership Group provides member firms with all the marketing, strategy and consulting tools they need to provide value-added services, now recognised as the profitable way forward.

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2020 Products offers professionals a wide range of tools and products to assist with growth and profitability.

Forms, Letters & Tools 2010

Order Form

| Product | 2020 Member | Qty | Non Member | Qty | Total |
|--------------------------------------|-------------|-----|------------|-----|-------|
| Forms, Letters & Tools 2010 Upgrade* | £120.00 | | £160.00 | | £ |
| Forms, Letters & Tools 2010 | £199.00 | | £275.00 | | £ |
| Additional Office License | £120.00 | | £160.00 | | £ |

* from a previous version

The essential product for every accountancy practice

| | |
|--------------|----------|
| Subtotal | £ |
| Plus VAT | £ |
| Total | £ |

Forms, Letters & Tools 2010 has been totally updated, upgraded and expanded

Forms, Letters & Tools is a comprehensive collection of over 250 useful forms, letters and tools and is an essential product for every accountancy firm. This product compiles all the forms and letters that you need for the day to day running of your practice. All the items are located on one readily accessible CD and have been updated for 2010.

Forms, Letters & Tools covers the essential elements of your practice:

- Accounts
- Administration
- Audit
- Corporate Finance
- Financial Services
- Marketing
- Miscellaneous
- Paperless Office
- Practice Assurance
- Taxation
- Template Letters
- Word Tips

FORMS, LETTERS
& TOOLS COMES
WITH A FULL 28
DAY MONEY BACK
GUARANTEE IF YOU
ARE NOT
COMPLETELY
SATISFIED WITH
THE PRODUCT

New Tools for 2010

There are TWO interactive checklists included, called CheckQ, covering **Accounts Quality Control** and **New Clients**. These interactive tools guide you through a series of questions about your accounts and new client procedures and areas to consider. You can choose to add or omit sections from the report, allowing it to be totally customisable for each client. It is a quality control checklist that generates a report for the client file to ensure you have covered all areas concerning the client.

The **Service and Product Matrix** is an essential Profit Improvement tool for your practice, which enables you to score your target markets, the ability to win a client in the chosen market and the related profitability.

There are two additional **Audit Template Letters** covering a stock take and a bank acknowledgement letter. Also included is the Audit Price List. This template allows you to facilitate the discussion with a client about your fees.

Also new for 2010 is the implementation of "**DataDoc**" technology within some of the letters (for illustrative purposes). This gives you the ability to insert client fields into the template letters directly from any SQL Server or Access database (subject to being able to access the database tables), saving valuable time and effort. There is no mapping or programming required. Users will need to acquire a chargeable add-in to facilitate this technology at a small additional cost.

A NEW **Marketing** section has been added for 2010 including 6 new tools.

THE ESSENTIAL
PRODUCT FOR
EVERY
ACCOUNTANCY
PRACTICE

20 BRAND NEW
TOOLS AND OVER
90 UPGRADES
FOR 2010

"Forms, Letter & Tools is an essential product in the running of our practice. It's jam packed with lots of useful letters and templates. It not only saves us writing them from scratch but saves us time! For the price, this product has paid for itself many times over!"

Jonathan Wall, Elman Wall Chartered Accountants (3 Partners)

Upgraded for 2010

Over 90 tools have been upgraded, including all the client letters with the latest year ends and 5 April 2010 tax return related letters and checklists. All PAYE letters have been upgraded to cover late payment penalties. All existing VAT letters have been upgraded to cover online filing plus an additional 3 NEW letters have been added.

There are many favourite tools used by existing purchasers including Electronic Working Papers which

saves users a considerable amount of time. These working papers include individual lead schedules and a summary of all the lead schedules into a trial balance. Other favourites include Business Analyst, a great tool to promote and introduce consultancy services (notably Profit Improvement) plus a series of Engagement Letters covering all aspects of your business.

2010 - THE MOST
COMPREHENSIVE
UPGRADE FOR
FORMS, LETTERS
& TOOLS

Forms, Letters & Tools 2010

Here is a comprehensive list of the tools within each section

Accounts

| | |
|--------------------------------|----------|
| Accounts Preparation Checklist | |
| Accounts to Client | |
| Accounts Working Papers | UPGRADED |
| Adding Value Checklist | |
| Audit Price List | NEW |
| Breakeven Analysis | |
| Breakeven Graphical | |
| Cash Balance Projector | |
| Client Manager System | |
| Client Software Record | |
| Client System Adjustments | UPGRADED |
| Computerised Work Programs | UPGRADED |
| Farmers Stock Sheet | |
| Five Year Analytical | |
| Five Year Summaries | |
| Graphing Tool | UPGRADED |
| Lead Schedules | |
| Loan Calculator | |
| Meetings (Mind Map) | |
| Meetings Notes | |
| Notes and Queries | |
| Period Procedures | |
| Pre Year End Meeting Notes | UPGRADED |
| Sparklines - mini graphs | |
| TB Reconciliation | |
| VAT Tracker | |
| Where did the money go? | |
| Working Papers Index Sheet | |

Administration

| | |
|---|----------|
| Accounts Planning | NEW |
| Additional information (New Client) | UPGRADED |
| Authority to Disclose Information | |
| Billing Instructions | UPGRADED |
| Billing text | UPGRADED |
| Briefing Sheet | |
| Client Tax Repayment Letter of Assignment | |
| Client Account Cheque Request | |
| Course Evaluation Form | |
| CPD Records | UPGRADED |
| Customer Care Checklist | |
| Database Amendment Form | |
| Delegation and Action Tools | |
| Disbursements Record | |
| Expenses Claim Form | UPGRADED |
| Fax Cover Sheet | |
| File Note | |
| Fit and Proper Forms | |
| HMRC Authority | |
| Money Laundering ID Form | |
| New Client Forms | UPGRADED |
| New Client Setup Checklist | UPGRADED |
| Permanent File Index Sheet | |
| Personal Development Plans | |
| Personal Guarantee for Directors | |
| Staff Feedback Form | |
| Staff Induction Form | UPGRADED |
| Staff Planner | |
| Standing Order Mandate | |
| Time Sheet | |

“We find this product such a useful addition. Not only does it save us reinventing the wheel, it also provides us with useful thoughts and reminders when looking for inspiration and under pressure to produce work for clients. This product in particular and the other 2020 products are in regular use in this office.”

Tony Collinson, Collinsons Chartered Accountants (Sole Practitioner)

Audit

| | |
|--|-----|
| Stocktake Checklist | NEW |
| Business Plan Guidance Notes, Template & Review Checklist | |
| Cash Flow Marketing Letter | |
| Corporate Finance Marketing Letter | |
| Due Diligence Engagement Letter, Sample Work Programme & Letter to Accountant | |
| Exit Strategies Marketing Letter | |
| Letter to Reporting Accountants | |
| Pre Lending Qualification Checklist | |
| Preliminary Review Meeting Checklist | |
| Simple 12 Month Profit & Loss and Cash Flow | |
| Simple Company Valuation | |
| Strategic Planning Template & Checklist | |
| Valuations Tools, Share Valuation Checklist & Sample Valuation Report Contents | |

Financial Services

| | |
|---------------------------------|----------|
| Financial Services "GreenSheet" | |
| Pension Calculator | UPGRADED |
| Pension Credit Application | |
| Stakeholder Pension Calculator | |
| State Pension Forecast | |

Marketing

| | |
|----------------------------|----------|
| Marketing Programme | NEW |
| Organising Direct Mail | NEW |
| Personal Affairs Checklist | NEW |
| Reception Slideshow | |
| Seminar Planning Checklist | |
| Service and Product Matrix | NEW |
| Tough Times Checklist | NEW |
| Tough Times Letter | NEW |
| Winning Clients | UPGRADED |

Miscellaneous

| | |
|------------------|--|
| Agenda Creator | |
| Business Analyst | |

Paperless Office

| | |
|----------------------|--|
| Accounts Attachments | |
| Company Formation | |

Practice Assurance

| | |
|--|----------|
| Annual Compliance Review | UPGRADED |
| Compliance Review Areas | |
| DPB Annual Compliance Review Checklist | |
| DPB Corporate Finance Review | |

“Forms, Letters & Tools is a great product and one we use all the time. We take the standard 2020 templates and import them into our document management system to ensure we all carry out standard procedures/tasks in the same way every time! A great time saver for a very small investment!”

Elinor Perry, Pentlands Business and Tax Advisors (2 Directors)

Taxation

20+ Steps to Create a Tax Return

Car Co2 Emissions Record

Liabilities Schedule **UPGRADED**

Missing Information Sheet

VAT Interactive Online Registration Form

VAT Online Registration Form

Template Letters

Administration

Audit Proposal Letter

Cash Collection System **NEW**

Disengagement Letters (3 letters) **NEW**

Fixed Price Agreement

Handover Letters (3 letters)

Unincorporated Business Proposal Letter

Sample Engagement Letters

Charity Audit Engagement Letter

Charity Independent Examination

Company Audit Engagement Letter

Company No Audit Engagement Letter

Engagement Covering Letters

Engagement Standard Terms Letter 1

Engagement Standard Terms Letter 2

Partnership Memorandum of Services

Payroll Engagement Letter

Small Business Engagement Letter

Sole Practitioner Memorandum of Services

Solicitors Engagement Letter

Solicitors Memorandum of Services

Tax Engagement Letter

Trust Tax Engagement Letter

Template Letters continued

Accounts

Company Accounts Letters (10 letters) **UPGRADED**

Reminder & Chaser Letters (3 letters) **UPGRADED**

Sending Accounts to Clients (10 letters) **UPGRADED**

Audit

Bank Acknowledgment of Audit

Bank Audit Request **NEW**

Letter of Representation

Management Governance Letter

Miscellaneous

Loan Application Reference

State Pension Forecast Letter

Taxation

Taxation (1) - Preparation (5 letters) **UPGRADED**

Taxation (2) - Client Letters (38 letters) **UPGRADED**

Taxation (3) - HMRC Letters (12 letters) **UPGRADED**

VAT & Other Letters **NEW**
(5 letters, 3 NEW documents added)

PAYE Letters (3 letters) **UPGRADED**

Word Tips

Handy tips for Macros, AutoCorrect, Find & Replace, Auto Text, Tables, Work Buttons, Shortcuts and Online Training

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PURCHASE DETAILS**

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