

Price list

Tax planning reports, accounts and compliance. Every fee is fixed and agreed in writing before any work starts.

40×

Across the last 30 estates we reported on, worth over £60 million between them, the tax savings we identified came to more than forty times our fees. Savings are illustrative, and depend on your own figures and on the steps actually being taken.

Tax planning reports

Eight fixed-price reports, priced by the size of what they cover

When you sell

Sixty-day property returns and capital gains tax

Accounts and compliance

Year end, bookkeeping, payroll, MTD and self assessment

Trusts and disclosures

Registration, trust returns, beneficiaries, and putting things right

FIXED, AND AGREED FIRST

Tax planning reports

Priced by the size of the assets or the income the work covers, never as a share of the tax saved.

Lifetime Gift Report

BASED ON THE VALUE OF THE GIFT

Up to £250,000	£3,000
£250,000 to £325,000	£4,000
£325,000 to £1m	£5,000
Above £1m	0.5%

Relief review, where business or agricultural property relief may apply, on the value of the relievable property: up to £2m £1,000 · £2m to £3m £1,500 · above £3m 0.05%. It says whether the asset looks capable of qualifying, not that relief is available.

Regular Gifting Report

BASED ON THE TOTAL GIVEN EACH YEAR

Up to £20,000	£1,500
£20,000 to £50,000	£2,250
£50,000 to £100,000	£3,000
Above £100,000	3%

Includes your first twelve months of gifting records. Annual record from year two, billed monthly, a couple 1.75 times the individual fee: up to £20,000 £450 · £20,000 to £50,000 £600 · £50,000 to £80,000 £800 · above £80,000 1%.

Pension Estate Report

BASED ON THE ESTATE INCLUDING THE PENSION

Up to £2m	£2,000
£2m to £3m	£3,000
£3m to £4m	£4,000
Above £4m	0.1%
Where the report covers a couple, add	50%

From 6 April 2027 most unused pension funds fall within the estate for inheritance tax. The report models your position over twenty years under four approaches, from leaving things as they are to drawing down to fund gifts, and shows how much of the pot reaches your family under each.

The top band is a percentage of the whole figure, not only the part above the threshold. An estate of £6m is 0.1% of the whole £6m, so £6,000.

Annual Estate Update

SETTING UP YOUR ESTATE SCHEDULE, BASED ON ESTATE VALUE

Up to £2m	£1,000
£2m to £3m	£1,500
£3m to £4m	£2,000
Above £4m	0.05%

Free where you have taken a Pension Estate Report, as the schedule is prepared as part of it. Each year thereafter, 40% of the setting-up fee and rising with inflation: up to £2m £400 a year · £2m to £3m £600 a year · £3m to £4m £800 a year · above £4m 0.02% a year.

Property Income Efficiency Report

BASED ON GROSS ANNUAL RENTAL INCOME

Up to £50,000	£1,000
£50,000 to £100,000	£1,500
£100,000 to £200,000	£2,000
Above £200,000	1%

Property Business Report

BASED ON GROSS PORTFOLIO VALUE

Up to £1m	£3,000
£1m to £2.5m	£4,000
£2.5m to £5m	£5,000
Above £5m	0.1%

Property Incorporation Report

BASED ON GROSS PORTFOLIO VALUE

Up to £1m	£4,000
£1m to £2.5m	£5,000
£2.5m to £6m	£6,000
Above £6m	0.1%

Family Investment Company Report

BASED ON THE AMOUNT FUNDED

Up to £1m	£4,000
£1m to £2.5m	£5,000
£2.5m to £6m	£6,000
Above £6m	0.1%

YEAR IN, YEAR OUT

Accounts and compliance

One chartered team for the statutory work, on a fixed monthly fee rather than an hourly rate.

EVERY YEAR

Accounts and Tax

From £45 a month

Sole traders; complex structures quoted

Bookkeeping

From £45 sole trader, £125 company

A month, all in, never hourly

Payroll

From £8 a payslip

Minimum £25 a month; businesses under ten staff

Making Tax Digital

From £35 a month

Set up within seven days

Self Assessment

Fixed fee, from £300

Set by complexity, agreed before we start

WHEN YOU SELL

Sixty-day property returns

Fixed fee, from £450 a return

Per disposal, agreed before the sixty days start

Capital Gains Tax

Fixed fee, from £450 a disposal

Per disposal; a portfolio of shares counts as one

TRUSTS

Trust registration (TRS)

From £420

A simple registration; more complex trusts quoted

Trust tax returns

From £350

A straightforward trust return; more complex trusts quoted

Trust beneficiaries

From £350

Per beneficiary, per tax year

PUTTING THINGS RIGHT

Disclosures to HMRC

From £1,500

Quoted once we know the scope; every case is different

ONE TEAM

Accounts, corporation tax, self assessment, VAT, capital gains and HMRC investigations handled in house by one chartered team, not a chain of specialists.

FIXED MONTHLY FEE

Agreed up front and billed monthly. Never hourly, and never a bill you did not expect. Fee protection insurance is available.

A NAMED ACCOUNTANT

Not a call centre. A senior accountant reviews every set of books and every return before anything is filed.

This is optional in both directions. Taking a tax planning report does not require you to move your compliance work to us, and moving your compliance work to us does not require you to take a report.

NO HOURLY BILLING

The figure, before you decide

We quote before we start, not after. You have the figure in writing, with the band it comes from and what it covers, before you decide.

Our fee is set by the size of the assets or the income the work covers. It is never a share of the tax saved. Size is the best proxy for how complex the work is and how much time it takes. The band your figure falls into sets the fee. In all but the top band that is a set amount. In the top band it is a percentage of the whole figure, not only the part above the threshold.

If what you have asked us to look at turns out to be larger than it first appeared, we will say so and agree the change with you before carrying on.

AGREED FIRST

The price is fixed in writing before any work starts. No hourly billing, and no range we bill the top of.

YOURS TO KEEP

A secure electronic copy and a printed, bound copy. Take it to your solicitor, your IFA, or the accountant you already use.

NEVER CONTINGENT

The fee follows the size of what the work covers. It is never a share of the tax saved.

These fees buy the report. Putting the advice into effect is separate work and may carry further fees from us, a solicitor and an IFA. We are not authorised or regulated by the Financial Conduct Authority, so regulated financial advice comes from the IFA.

Report prices include VAT. Service prices are plus VAT. Prices are those in force at the date shown and may change.

Start with a conversation

Tell us what you are trying to do. We will tell you which report answers it and what it will cost, before any work starts.

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OFFICE

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Nothing in this price list is advice on your own circumstances. Advice needs a fact find, a letter of engagement and a fee agreed before work starts, and that is what the reports are. Mercian Accountants Ltd. Registered in England, number 09616525. Registered office: Unit 35 Rural Enterprise Centre, Stafford Drive, Shrewsbury SY1 3FE. VAT registration number GB 231008464. Information Commissioner's Office registration number ZA291656. Supervised by HMRC for anti-money laundering, and compliant with HMRC's Standard for Agents. Effective 1 September 2026.