

Making Tax Digital software checklist

- Do I want a free product or am I willing to pay for software?
- Are there any free trials and does the subscription automatically renew?
- How much customer support will I need?
- Do I need accounting software or bridging software?
- How do I extract my data?
- Do I have any accessibility needs?
- Do I need software to have a Welsh translation?
- What specific features do I need?
- If already using software, is it making tax digital compliant?
- Do I need to be able to pull reports from the software?
- Do I want software that will link to my bank?
- Does the software limit the number of transactions it can report?
- Is the software compatible with my hardware (e.g., windows or mac)
- Can the software deal with all my sources of income?
- Will the software allow me to access my data if I stop paying for a subscription?
- Do I need a desktop product or am I happy with cloud based?
- Is my software futureproof? (If your circumstances are likely to change in the future)

For the most up to date information, please refer to our website at www.litrg.org.uk.

For further information on software for Making Tax Digital, visit:

www.litrg.org.uk/tax-nic/making-tax-digital-income-tax/choosing-making-tax-digital-software.