



In 2020 I achieved my goal of becoming a FreeAgent gold partner!

7 reasons why I love FreeAgent.

YFreeAgent is the accountancy software package of choice for my practice. When I started out just over 2 years ago, I trialled various packages and this was the best fit for me and the practice I hoped to build. I am now a Gold partner with FreeAgent and 80% of my clients use the software.

It was important to me to partner with an accountancy software provider as HMRC's Making Tax Digital (MTD) was imminent when I started out, and VAT registered clients absolutely had to get using it. MTD is coming for self employed income tax from April 2023 too, and my practice will be ready for it.

1. FreeAgent is perfect for my ideal client.

My ideal client is a service based business with turnover <£250k. My clients are all UK based and include professional consultants, makeup artists, builders, coaches, video editors, event planners, marketers, graphic designers, VAs... the list goes on. If you are a small business owner, I'm happy to help you to understand your finances and comply with accounting and tax rules and deadlines.

FreeAgent is great for service based businesses as it keeps things simple. Bank reconciliation done once you explain all the bank transactions and ensure your balance in FreeAgent matches your statement. Simple invoicing process including credit control. You can keep on top of purchase invoices (called "bills" in FreeAgent) and enter "out of pocket expenses".

More advanced features include "time tracking", "projects" and "estimates" and you can use the contacts area as a database, keeping your customer list up to date.

2. FreeAgent links to your bank via open banking.

If you previously used Excel for your bookkeeping then this feature will save you so much time! No more typing up the bank transactions on to a spreadsheet thus avoiding human error. Enable your bank feed and FreeAgent pulls all the transactions (from a start date you decide on) into the bank account area of the software. You then just need to explain the transactions, whether this is by linking it to an invoice, bill or expense or stating what it is, e.g "travel", "drawings" or "VAT payment". The software does all the work in the background and creates the trial balance from your explanations.

3. FreeAgent is cloud based software.

This means you can access your account from anywhere and so can your accountant. So if you have a question about something, or if I need to query a detail, I can quickly check in on clients data and make sure it's all running smoothly, at any point mid-year and not just after your financial year end.



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4. FreeAgent is business focused rather than accountant focused.

FreeAgent was set up by a contractor, a non accountant , as he felt there was a gap in the market for software that was easy to use and understand for business owners. He was right! There is not as much jargon as in other software, therefore business owners like it.

5. FreeAgent is available for free with NatWest or RBS business banking and the Mettle banking app.

This is a biggie. As I said, my clients are small businesses and they want to save costs wherever possible, especially at the moment. If it's cheap, great, if it's free even better!

Use FreeAgent software and with the help of the support team and alongside an accountant , your tax return stresses will soon be a thing of the past.

6. The customer service is exceptional.

I absolutely have to mention the top class UK based support team too. Their head office is based in Edinburgh. As a Gold accounting partner I have a dedicated account manager who keeps in touch and provides training sessions for my clients too. You can call or email the support team as an individual 24/7, they are always quick to respond and more importantly, a very large majority of their responses solve your problems.

7. They collaborate with me on events.

Come along to one of my free training webinars if you want to learn more about FreeAgent for small businesses. The next one will be in February 2021. Get in touch if you want to know more about FreeAgent, Mettle banking app or my accounting services.

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