

EMAIL TEMPLATES

Reaching out to clients affected by MTD for ITSA

HMRC's Making Tax Digital for Income Tax Self Assessment (MTD for ITSA) will be one of the biggest-ever changes to the UK tax system, affecting both practice and client processes.

These email templates will help you get the messages right for any of your clients who will be affected by MTD for ITSA and are not yet using FreeAgent.

Please feel free to copy and paste these three templates and email them to your clients. Remember to delete the sections we've put in brackets and enter each client's information instead.

EMAIL TEMPLATE 1

Subject line

MTD: A change to the way we work together

Body copy

Dear **[client name]**,

As you may already be aware, HMRC is rolling out the next phase of Making Tax Digital (MTD), a government initiative that aims to implement a fully digital tax system in the UK.

From April 2026, self-employed business owners and landlords with annual business or property income above £50,000 will need to follow the rules for [MTD for Income Tax](#). As a **[business type, e.g. landlord]**, you'll need to comply when the new legislation rolls out. This will mean a change to the way we currently work together.

Although 2026 might seem like a while away, we want to get you prepared for MTD for Income Tax sooner rather than later. In order to remain compliant with HMRC's rules and the shift from annual to quarterly returns, you will need to start using accounting software. We recommend [FreeAgent](#) as the accounting software solution for **[enter business name here]**. FreeAgent's features are designed to help small businesses like yours tackle some basic admin tasks, which is why over 150,000 small business owners choose to use it. The software also makes it far easier for you to share your business figures with us.

***For eligible clients only**

As a [NatWest/Royal Bank of Scotland/Ulster Bank NI] business banking current account holder, you can get the full version of FreeAgent for free for as long as you retain your bank account.

As a Mettle account holder, you're eligible to use FreeAgent for free provided that you mark Mettle as your primary business account in FreeAgent.

I'd love to set up a video call so I can show you how FreeAgent works. What day/time would be convenient for you?

[Add your contact details]

EMAIL TEMPLATE 2

Subject line

How FreeAgent can help your business flourish

Body copy

Dear **[client name]**,

From April 2026, you'll need to comply with HMRC's [MTD for Income Tax](#), which will change the way we work together. We'd like to get you set up to manage some of your own admin sooner rather than later. The good news is that this will give you a better overview of your business finances.

We're going to get you set up on [FreeAgent](#) accounting software so that you're familiar with how it works well in advance of your first quarterly MTD for Income Tax submission. Here are just some of the features designed to help small businesses like yours:

- Pull your bank transactions directly into FreeAgent by setting up a bank feed
- [Explain your own transactions](#) or let FreeAgent's AI automatically explain and categorise many of your business transactions for you
- Use the [FreeAgent mobile app's](#) 'Capture for later' feature to snap pictures of receipts and store them in the 'Files' area of your FreeAgent account
- Whip up professionally designed estimates, send them to your customers directly from the mobile app and easily convert them into invoices when a customer approves the work
- **[For clients with property income]** Manage single or multiple properties, assign a tenant as a contact and add property-specific nominal codes for any property-related expenses

I'd love to set up a video call so I can show you how these features work. What day/time would be convenient for you?

[Add your contact details]

EMAIL TEMPLATE 3

Subject line

Getting set up on FreeAgent

Body copy

Dear **[client name]**,

From April 2026, you'll need to comply with HMRC's [MTD for Income Tax](#), which will change the way we handle your Self Assessment.

We're going to set you up on [FreeAgent](#) accounting software on **[insert date]**. The software can give you a better overview of your cashflow and allow you to easily manage some basic admin tasks, including capturing receipts and explaining your bank transactions. This will make it easier for you to adapt to this new way of working and for us to prepare for the switch from annual to quarterly filing.

Let me know if you'd like a demonstration of how FreeAgent's features work once we've got your new account set up.

[Add your contact details]