

First-year compliance calendar

The first year is the one most often mishandled, because the deadlines derive from your accounting reference date rather than your incorporation date — and the first accounting period is usually longer than twelve months.

Record these on day one

- ☐ Incorporation date
- ☐ Accounting reference date (your year end)
- ☐ First accounts period end — often 13 to 14 months after incorporation
- ☐ Confirmation statement due date
- ☐ Corporation tax payment deadline
- ☐ Corporation tax return deadline

Sequencing that catches people out

- ☐ The corporation tax payment deadline usually falls BEFORE the filing deadline
- ☐ The confirmation statement runs on its own cycle, not your year end
- ☐ A confirmation statement confirms — it does not update. File changes separately
- ☐ Late filing penalties escalate and cannot be appealed for forgetfulness

Event-driven filings — no calendar prompt

- ☐ Appointing or removing a director
- ☐ A change to a director's name or service address
- ☐ Issuing or transferring shares
- ☐ Changing the registered address
- ☐ A change in who has significant control
- ☐ Changing the company name or accounting reference date

How to run it

- ☐ Keep the list somewhere shared, not in one person's calendar
- ☐ Set a review point three weeks before each deadline, not on it
- ☐ Name one person accountable for each item
- ☐ Ask 'does this trigger a filing?' whenever anything changes

