Cranleys
CHARTERED ACCOUNTANTS



CRANLEYS' CUNNING PLANS · No. 03 · STARTING UP

Company Formation, Companies House and HMRC Checklist

Tick it, print it, pin it up. Every box you cannot tick is a conversation worth having.



By Colin Davison FCA, Managing Partner, Cranleys Chartered Accountants. In practice since 1998. Reviewed 15 November 2026 against the 2026/27 rules.

THE QUICK ANSWER

To form a company, register it with Companies House with a name, address, directors, shareholders and articles. Verify identities, record people with significant control, tell HMRC when trading starts, and diarise the first accounts and confirmation statement dates.

THE KEY FIGURES

The key facts	What to know
Register with	Companies House
Tell HMRC	within 3 months of starting to trade
First accounts	21 months after incorporation
Confirmation statement	every 12 months
Records	director and shareholder registers kept

Cranleys is a trading style of Cranleys Partnership LLP, registered in England OC358781. Winton House, Winton Square, Basingstoke RG21 8EN · 01256 830000 · www.cranleys.online

The checklist, box by box

	The check	What to do	Keep as evidence
☐	**Is the company name and address sorted?**	Check availability and avoid names too close to existing ones. The registered office needs a real address for official post.	Name check, address proof
☐	**Are directors and shareholders right?**	Decide who holds the shares and who runs the company. Shares and rights should match your plan.	Share structure note
☐	**Is identity verification done?**	Directors and people with significant control must verify their identity with Companies House.	Verification confirmation
☐	**Are the articles and any shareholders agreement right?**	Model articles suit simple cases. Several owners need an agreement covering decisions, exits and disputes.	Articles, signed agreement
☐	**Has HMRC been told?**	Register for corporation tax when you start trading, and for PAYE or VAT if needed.	HMRC letters, UTR
☐	**Is the filing calendar set?**	First accounts, the company tax return, payment and confirmation statements all have separate dates.	Calendar



MY PRO TIP

put the filing dates in the calendar on day one.

A worked example

A company incorporated on 15 January 2026 has until 15 October 2027, 21 months, to file its first accounts. But corporation tax is paid nine months and one day after the end of the accounting period, which can come sooner. Missing either date costs penalties.

The trap to avoid

Forming the company and forgetting HMRC. If you start trading and do not register for corporation tax in time, penalties follow.

The Rufus test

One question that tells you if you have the right adviser:

Who owns what, who decides what, and where is it written down?

What has changed recently

- Identity verification is now part of company formation. Check each director and significant owner has completed it.
- Tax registration comes next. See the tax registration checklist.
- Company tax rates and limits. See the corporation tax checklist.

Questions I get asked

How do I set up a limited company in the UK?

Register with Companies House, choose officers and shares, then tell HMRC when you start trading and register for other taxes as needed.

Cranleys is a trading style of Cranleys Partnership LLP, registered in England OC358781. Winton House, Winton Square, Basingstoke RG21 8EN · 01256 830000 · www.cranleys.online

Do I need an accountant to set up a company?

Not legally, but a good setup avoids expensive fixes in structure, shares and filings.

What is a confirmation statement?

A yearly update to Companies House confirming company details.

When are my first accounts due?

21 months after the date of incorporation for a private company.

The 9 CAD Keys link: Consistency

Consistency in company admin means the register, the bank, the tax records and reality all say the same thing.

Colin's 9 CAD Keys. CORE: Clarity, Capability, Consistency. ADVANCED: Analysis & Positioning, Alignment, Acceleration. DYNAMIC: Differentiation, Dexterity, Development. Score each key 1 to 5 in the free Business Value Assessment Scorecard, total out of 45. *Freedom is built. One CAD Key at a time.*

Tick these next

Business checklist 02
Sole Trader, Partnership or Limited Company Checklist

Business checklist 05
Tax Registration Checklist: VAT, PAYE, CIS and Self Assessment

Business checklist 09
First-Year Survival: The 12-Month Business Plan Checklist

Tax checklist 12
Corporation Tax and Close Companies Checklist 2026/27

Go deeper: my books

For this topic, start with **Starting Up Secrets**, part of The Cranleys Business and Tax Secrets Series: Property Tax Secrets, Inheritance Tax Secrets, Business Tax Secrets, Starting Up Secrets, Business Growth Secrets and Business Exit Secrets. The books are launching soon. Join the launch list at cranleys.online/books and I will tell you the moment each one is released.

YOUR NEXT STEP

Ring me. Free draft plan, no hard sell.

I will build you a free draft tax plan or business plan on my 9 CAD Keys: a scorecard, a 12-month cashflow forecast, a 90-day action plan and a review with me. **1** Get in touch. **2** Short intro call. **3** Your free draft plan in plain English. You decide what happens next.

Tick, file, relax.

WhatsApp 07999 900000 | **Office** 01256 830000
Email colin.davison@cranleys.co.uk
Web cranleys.online

Scan to read online, tick it on screen and take the Scorecard



General information on UK tax only, not advice for your specific circumstances. Tax rules change. Free draft plans are offered at my discretion and subject to availability; putting a plan into effect is chargeable. Cranleys is a trading style of Cranleys Partnership LLP, registered in England and Wales (OC358781). Registered office: Winton House, Winton Square, Basingstoke RG21 8EN. © Colin Davison FCA, Cranleys Chartered Accountants.