

Client Enquiry Form:

Name

Date of birth

N.I Number

Business name

Premises: owned/leased/rented

Business Commencement/Incorporation date (Ltd).....

Year-end date

Registered number

Correspondence/business address

.....

.....

Postcode Telephone Mobile.....

Fax number

Email Website.....

Private addresses.....

.....

Postcode Telephone

Name of bank.....

Branch address.....

.....

.....

Client's previous occupation and dates

Rental income details

.....

Company Vehicle/Make CC Reg No Purchase/valuation date

.....

Equipment/tools

Cost/Valuation date £.....

Fixtures & fittings introduced

Cost valuation date

How financed?

Previous accountant

.....

Reason for change

Source of introduction

.....

Tax District & reference number (*Company or Sole Trade*)

.....

Practice Partner or member of staff responsible.....

VALUE ADDED TAX

Registration number

Should client be registered (NB Beware more than one business) Yes/No

PAYROLL SERVICES

Does client require payroll services Yes/No