

## **NEW CLIENT FORM**

### **1.0 CLIENT DETAILS**

1.1	Business Name:	
1.2	Address:	
1.3	Registered office address (if different from above):	
1.4	Company name and number:	
1.5	Company Unique Tax Reference Number (UTR):	
1.6	Telephone:	
1.7	Fax:	
1.8	Email address:	
1.9	Website address:	
1.10	Source of introduction:	
1.11	Names of all Directors.  Please also detail Unique Tax Reference Numbers (UTR) and National Insurance numbers where applicable:	
1.12	Name of Company Secretary (if applicable)	
1.13	Names of shareholders and shareholding	

### **2.0 BUSINESS**

2.1	Description:	
2.2	Year end:	
2.3	VAT quarter ends:	
2.4	Turnover: £	
2.5	VAT status/VAT no:	
2.6	VAT registration date	
2.7	VAT scheme utilized (e.g. standard scheme, cash accounting, annual accounting, flat rate).	
2.8	VAT Flat Rate scheme (% age	

	payable) if applicable	
2.9	Is your business registered as an employer for PAYE purposes?  Please detail Accounts Office Reference and Employer Reference numbers if so:	
2.10	Is your business registered for CIS?  Please detail CIS number if so:	
2.11	Net assets: £	
2.12	Other factors:	
2.13	Regulatory requirements:	
2.14	Banker's name and address:	
2.15	Borrowings:	
2.16	Solicitor's name and address:	
2.17	Other (please specify):	

### 3.0 PROFESSIONAL ENQUIRY

3.1	Name of previous accountant:	
3.2	Contact:	
3.3	Address:	
3.4	Telephone:	
3.5	Any other information:	

### 4.0 TAXATION

4.1	Tax district:	
4.2	Contact:	
4.3	Address:	
4.4	Telephone:	
4.5	Are there any matters of dispute with HMRC? If yes, please give details:	

**5.0 OTHER CONSIDERATIONS**

5.1	Any other applicable information:	
-----	-----------------------------------	--

Signed: .....

Please print name: .....

Date: .....