Client change of details form

Tick what has changed, then give the old and new details and the date each change takes effect. Use one line for each change. Sign and return the form to your accountant; we will update our records and, if you ask us to, tell HMRC and Companies House.

Your full name _____ Business name (if for a business) _____ Client reference (optional) _____

1. What has changed? Tick all that apply

YOU	YOUR BUSINESS
☐ Name (marriage, civil partnership, deed poll)	☐ Trading name
☐ Home address	☐ Business address or registered office
☐ Phone number or email address	☐ Directors, partners or shareholders
☐ Bank account for tax refunds	☐ VAT registration or VAT scheme
☐ Marital or civil partnership status	☐ Taking on or losing employees
☐ Moving abroad or returning to the UK	☐ Business started, stopped or sold

2. Old and new details

What is changing	Old details	New details (include postcode for addresses)	Date it takes effect

3. Evidence and who to tell

If your name or home address has changed, please enclose a copy of the evidence: for a name, a marriage or civil partnership certificate or deed poll; for an address, a bank statement, council tax bill or utility bill dated in the last three months.

Evidence enclosed (type), or “Not needed” if neither your name nor home address has changed	Should we tell HMRC and, for companies, Companies House? Yes / No

Anything else we should know (optional)

For example: a new partner or spouse to add to your records, or a new contact at the business

4. Declaration

I confirm these details are correct and I authorise my accountant to update their records and, where I have answered Yes above, to tell HMRC and Companies House.

Signature	Date

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