New client information form for accountants

Please complete every section that applies to you and write “Not applicable” where a section does not. We use this information to set up your records, contact HMRC on your behalf and request handover from your previous accountant.

1. Who is the client?

☐ Individual ☐ Sole trader ☐ Landlord ☐ Partnership ☐ Limited company ☐ LLP ☐ Other: _____

2. Your personal details

Full name (and any previous names)	Date of birth
National Insurance number	Unique Taxpayer Reference (UTR), if you have one
Home address and postcode	Phone, email and preferred contact method

3. Business details

Business or trading name	What the business does
Business address	Date trading started
Company registration number (Companies House)	Registered office address
Company authentication code (for filings)	Accounting year end
Directors, partners or shareholders (names and %)	Number of employees

4. HMRC registrations

Registration	**Registered? Yes / No**	**Number or reference**
VAT (and scheme: standard, flat rate or cash)		
PAYE employer reference		
Accounts Office reference		
Corporation Tax UTR (companies)		
Construction Industry Scheme (CIS)		

5. Previous accountant

Accountant or firm name	Contact email or phone
Last accounts or tax return they prepared	May we contact them for professional clearance? Yes / No

6. Services you would like

Service	Tick	Service	Tick
Self-assessment tax return		Bookkeeping	
Year-end accounts		Payroll and pensions	
Corporation Tax return		VAT returns (Making Tax Digital)	
Making Tax Digital for Income Tax		Company secretarial / confirmation statement	
Tax planning or advice		Other:	

7. Identity documents

Anti-money laundering rules require us to verify your identity before we act for you. Please enclose or bring one photo ID (passport or photocard driving licence) and one proof of address dated in the last three months (utility bill, bank or council tax statement).

Photo ID enclosed (type)	Proof of address enclosed (type and date)

8. Authorisation and declaration

I confirm the information above is correct. I authorise the practice to act as my agent with HMRC and to contact my previous accountant for professional clearance.

Signature	Date

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