

Client Information Sheet

Contact Details

Your Name

Prefix

First

Middle

Last

Your business/company name

Your email (Main email contact address – we will use this for all correspondence as far as possible)

Enter Email

Confirm Email

Address (Please enter your postal address or day to day contact – we will use email where possible)

Street Address

Address Line 2

City

County

Postal Code

Country

Mobile phone

Home phone

Work phone

Trade/business sector (A description of what you do, eg IT Contractor, Freelance engineer, solicitor, retired, private client)

Additional contact information (If there are any additional contact details, eg bookkeeper or office manager, please enter details)

Existing Business Section

Company/LLP name

Company/LLP registration number (Companies House)

Companies House filing authentication code (Authentication code for Companies House, 6 digits alphanumeric)

Are you registered as Self Employed with HMRC?

- Yes, I am
- No, I am not but I am doing this now
- No, I am not, please attend to this for me

Date you started trading

Are you VAT registered?

- Yes, VAT registered
- No, not VAT registered

Corporation Tax or Partnership Self Assessment registration number

Employers PAYE scheme reference

Employers PAYE HMRC accounts office reference

Business year end

Date last accounts prepared to

Bookkeeping (Please provide brief details of your bookkeeping system, eg spreadsheet, sage, other programme, manual, and who undertakes this)

Identification

By law we are required to obtain identification paper work for all clients, including in the case of companies, LLPs all officers (directors and secretaries) and shareholders, and in the case of partnerships all partners.

Normally either (1) a driving licence (both parts) or (2) passport plus utility bill/bank statement is adequate.

Scans are preferred to originals, and they can be emailed to use separately.

Confirmation and Instruction

- I instruct KABA Accounting Solution to act as my/our accountants. I have the consent of my co-directors/partners