

Client Information Sheet

General Information

Business Name	
Principal Business Activity	
Business Address / Registered Office	
Telephone/Mobile	
Date business incorporated	
Date business started to trade	

Legal Information

Structure of the Company (Sole Trader/Partnership/Limited)	
If Partnership Unique Tax Ref (UTR) number	

If Limited Company

Company Registration Number	
Corporation Tax Reference	
Value of each share	
Authorised share capital	
Issued share capital	

 **Financial Information**

Last Account made up to	
First Year Annual turnover	
Last Year Annual turnover	
Last Year Profit	
Last Year Dividend declared	
Any credit default/Bankruptcy	

 **Director 1 or Proprietor 1 details**

Name	
Address	
Date of Birth	
National Insurance Number	
Self Assessment Unique Tax Reference (UTR)	
No of Share hold	

 **Director 2 or Proprietor 2 details**

Name	
Date of Birth	

National Insurance Number	
Self Assessment Unique Tax Reference (UTR)	
No of Share hold	

(Please attach separate sheet if necessary)

 **VAT Registration details (if applicable)**

VAT Registration Number	
Date of Registration	
Date of Next Vat Quarter End	
Flat Rate Percentage (if applicable)	
Details of VAT Scheme (if applicable)	

 **Employer details (if applicable)**

PAYE Reference Number	
Accounts Office Reference Number	