

Ayre & Co Ltd Church Lane Caldwell Swadlincote DE12 6RT

NEW CLIENT QUESTIONNAIRE

Full Name Name you like to be called.....

Address
.....
.....

Phone Numbers:

Home Mobile Email.....

Professional/Trading Name (if different)

What is your profession?.....

Date of birth National Insurance Number

Name of Spouse Date of Marriage

Name of Youngest Child..... His/Her Date of Birth.....

Is this child living with you? No Yes

Do you have any Pensions? No Yes

If yes...	Company Name	Reference No	Date Started	Tick if Before 1 July 1988
	/ /	<input type="checkbox"/>
	/ /	<input type="checkbox"/>
	/ /	<input type="checkbox"/>

Do you have any savings accounts (including redundant ones)? No Yes

If yes...	Name of Bank/Building Society	When (roughly) were they opened?

Do you rent out a room in your own home? No Yes

Do you rent out any property? No Yes

If yes, what's the address?
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If there's a mortgage or loan, who is it with?.....

Now, please turn over

If you had a previous accountant, please inform them of your intention to change and write their name and address below, so that we can contact them.

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If you already have a tax office and reference number, please enter them below. Attach any recent correspondence and statement of account you may have received from the Tax Office.

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Major sources of current work

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Do you have any PAYE sources of income? If so, with whom and at what approximate level of salary?

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Have you received any Job Seekers Allowance/Income Support/Dole Money in the last two years?

No Yes

If yes, for what periods Roughly how much

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Have you informed the DSS/Contributions Agency that you are self-employed? No Yes

Do you pay any Self-employed National Insurance (called Class 2 NI)

Do you have any National Insurance taken from your earnings (called Class 1 NI)

Business Assets - please list separately all items you use/have used

Item (eg car, equipment, computer) **Approx Date Acquired** **Approx Cost**

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