

Ayre & Co Ltd Church Lane Caldwell Swadlincote DE12 6RT

NEW CLIENT QUESTIONNAIRE

Name

Address

.....

.....

Phone Numbers:

Home Mobile Email.....

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

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

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Do you have any shares in other companies? No Yes

Shares held..... Quantity and type of shares.....

Shares held..... Quantity and type of shares.....

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

Personal.....

Company.....

Company NumberDate of Incorporation.....

Company Secretary.....

Share Holders and Share Holdings:

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.....

VAT Registration Date.....VAT Registration Number.....

VAT scheme used eg Cash/Annual/Flat Rate.....

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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Do you draw a salary from the company No Yes

Does another member of your family draw a salary from the company No Yes

Do you have any benefits from the company eg car, pension, from the company No Yes

Does another member of your family have benefits from the company No Yes

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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Any further details you think are relevant: