



## New Client Form – Individuals / Self-Employed

<b>Personal Details:</b>			
Full name (inc maiden name in brackets)			Mr/Mrs/Ms/Miss
Date of birth	NI Number	Personal Tax Ref (10 digit)	
Address (please also notify us of previous if lived at this one for less than 3yrs):			
Town		County	Postcode
Telephone:	Mobile:	Facsimile:	
e-mail			

<b>Business details (if Self-employed/Partnership)</b>			
Name of Business			
Business Description			
Trading commenced		Year end	
VAT No.		PAYE District and Reference	
Address (if different to personal details):			
Town		County	Postcode
Telephone:	Mobile:	Facsimile:	
e-mail (if diff to personal)			

<b>Bank details:</b>		<b>Solicitor / Other advisors</b>	
Address:		Address:	
Postcode		Postcode	
Telephone/Email		Telephone/Email	
Sort code		Telephone	
Account Number		Email	

<b>Categories &amp; Attributes</b>	
How did you hear about Halsey & Co?	
How do you keep your financial books and records?	
How would you prefer to be contacted for general communications?	Email / Post
Halsey & Co offer a Tax Enquiry Fee Protection service whereby your fees are covered in the event of HMRC scrutiny for a low annual subscription. Please ask for details and indicate here if you would like to subscribe to the service:	Yes / No / Maybe

### Services to be provided

What services do you want Halsey & Co to assist you with (tick box), and specifically, please indicate which services you don't want us to handle, e.g. a director's personal tax return (indicate clearly with cross).

Accounts - next period end due: <input type="checkbox"/>	Corporation Tax <input type="checkbox"/>
VAT returns (indicate frequency): <input type="checkbox"/>	Company Annual returns <input type="checkbox"/>
RTI only Submissions <input type="checkbox"/>	Personal tax returns <input type="checkbox"/>
Full Payroll services (indicate frequency): <input type="checkbox"/>	Spouse tax return <input type="checkbox"/>
CIS returns <input type="checkbox"/>	P11Ds <input type="checkbox"/>
End of year P35 <input type="checkbox"/>	Other <input type="checkbox"/>

**For Office Use Only :**

Reference	Prepared by	Date
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### Checklist for IRIS Entry (Enter in order)

1) Check services list above is complete: <input type="checkbox"/>	4) Set up services in IRIS: <input type="checkbox"/>
2) Create client in Iris – check involvements/contacts etc: <input type="checkbox"/>	5) Set up Correspondence / permanent file : <input type="checkbox"/>
3) Ensure H&CO partner entered in IRIS: <input type="checkbox"/>	6) Assign jobs if past year end <input type="checkbox"/>

CONNECTIONS/COMMENTS
ETHICS – Consider if we have the resources and capability to deal with the potential client. Consider their integrity.
Comments:
FEE QUOTED
NOTES