

**CHARLES STENNER & CO**  
**ACCOUNTANTS TAXATION AND BUSINESS CONSULTANTS**

Our Reference:  
Your Reference:  
Date:

Dear

in re: **Prospective Client/Client Company Information**

May we ask you to complete the questionnaire, insofar as each question is applicable, as soon as possible, and return it to us.

- 01 Your Full Name –
- 02 Your Private Address –
- 03 Private Telephone Number –
- 04 Name of your Business/Your Limited Company -
- 05 Address of your Business –
- 06 Date of Registration (if a Company) –
- 07 Registration Number (if a Company) -
- 08 Business Telephone Number –
- 09 Mobile Number –
- 10 Facsimile Number –
- 08 E-mail Address (**IMPORTANT**) –
- 09 Is the Business in joint names? –
- 10 Date the Business started –
- 11 Your/the Company's Accounting Year-End –
- 12 Type of Work or Services provided –
- 13 Name and Address of your Employer –
- 14 Date started with your Employer -
- 15 Salary/Wages per week/month/annum
- 16 Motor Vehicle Details -
  - Registration Number
  - Model
  - Cost
  - Date of Purchase
- 17 Your Date of Birth –
- 18 Your National Insurance Number –
- 19 Your/Company's Tax Reference Number – (10 digits)
- 20 Name and Address of your Tax Office –
  
- 21 VAT Registration Number –
- 22 Name and Address of your/Company's Bank –
- 23 Bank Sorting Code Number –

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- 24 Bank Account Number -
- 25 Title shown on Cheques -
- 26 Name and Address of your Solicitors -
  
- 27 Name and Address of your Present Accountants -
  
- 28 Present Accountancy Fee -
- 29 Investment Details -
  - Name of Bank/Building Society - Barclays
  - Account Number
  - (Please provide details on a separate sheet)
- 30 Pension Payment Details -
  - Policy Documents and Contribution Certificates
- 31 Mortgages and Loan Details -
  - Agreements and MIRAS Forms
- 32 Charitable Donations and Deeds of Covenant
- 33 Maintenance Payments
  - Court Orders
- 34 Have you/the Company been subjected to an Inland Revenue, VAT or DSS Enquiry?
- 35 If applicable, your wife's/husband's full names and date of birth.

Many thanks for your anticipated co-operation. Completion will save time/costs in setting up an office file for you.

We hope that we have a long and satisfactory relationship with you.

Yours very sincerely

*Charles Stenner*

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