



innovations
because tax matters, we count.

Client Information Form

Please complete this form using block capitals

Contact Details

Title and Forename:

Surname:

D.O.B:

NI Number:

UTR No:

Nationality:

Address:

Postcode:

Country:

Telephone Number:

Mobile Number:

Email:

Fax Number:

Please ensure that you also include-

Proof of identity (*e.g. copy of passport / driving licence with photocard*)
an original utility bill (*dated within the last 3 months*)
64-8 (*if requested*)

Winchester office

t. 01962 856 990

Innovations House, 19 Staple Gardens
Winchester, Hampshire, SO23 8SR

London office

t. 020 7917 2824

Tax Innovations, London Office
180 Piccadilly, London, W1J 9HF

Tax Innovations Limited
Registered in England No 3062165



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FOR INTERNAL USE ONLY

Allocated Manager (Initials):

Services to be provided:

| Personal Tax | Annual Accounts | Statutory Accounts | Corporation Tax | VAT |
|--------------|-----------------|--------------------|-----------------|-----|
| | | | | |

| Management Accounts | Payroll | Investment Tax | P11D | Other |
|---------------------|---------|----------------|------|----------------|
| | | | | |

L.O.E / ML

Iris

64-8

Database

Hard copy

Quickbooks

| Generated | Sent | Completed / Received |
|-----------|------|----------------------|
| | | |
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| | | |
| | | |
| | | |
| | | |

Other comments / related companies or clients:

Actions: File
Iris
P Drive

Seen and Reviewed by: S Christy
N Day
L Griffiths
S Griffiths
S Nichols
J Pearson
N Turpin
J Waddington

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