



innovations

because tax matters, we count.

## **Client Information Form**

Please complete this form using block capitals

### **Main Beneficiary and Contact Details**

Title and Forename:			
Surname:			
Nationality:			
D.O.B:		Fax Number:	
Telephone Number:		Mobile Number:	
Email:			
Address:			
Postcode:			
Country:			

*We will request further information and details of other beneficiaries at a later date.*

#### **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



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### Trustee Contact Details

Name of Trustee:		
Contact name: <i>(if known)</i>		
Address:		
Postcode:		
Country:		
Telephone Number:		
Email:		
Fax Number:		

### Other Information

DOTAS No: <i>(if known)</i>	
100% Owned company	
Name:	
Country of registration:	

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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

Generated	Sent	Completed / Received

L.O.E / ML

Iris

64-8

Database

Hard copy

Quickbooks

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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