[Company name]

How to use this document: delete this paragraph before saving, sharing, or circulating it. Every part shown in blue is yours to replace: type your own details over each blue [field] until no blue remains. Add or remove table rows to fit your needs. Then select all (Ctrl+A) and set the font colour to the same dark colour throughout. What is left is your finished document.

Accounting firm client intake form

New client - business details, services needed and the handover from the old accountant.

Client details

Business name	[Business name]
Contact name	[Name]
Phone	[Phone]
Email	[Email]
Address	[Address]
Entity type	[e.g. limited company / sole trader]
Year end	[Date]
VAT registered	[Yes / no - VAT number]
Services required	[e.g. bookkeeping, payroll, VAT, accounts]
Previous accountant	[Name - clearance requested Y/N]

Sign-off

Client	Partner	Date