



New Client Information - individual

Sole Trader Client ID (office use): _____
Personal Tax Client ID (office use): _____

Full Name _____
Date of Birth _____
NI Number _____
Trading name _____
Trading activity _____
Home address _____

Is this your correspondence address? Yes - No (Delete as necessary)

Business Address _____

Is this your correspondence address? Yes - No (Delete as necessary)

Telephone number _____
Mobile Number _____
Email address _____

Are you happy for confidential information to be sent to your email address? Yes - No (Delete as necessary)

If applicable/known

Unique Tax Reference (UTR) _____
VAT Number _____

Previous accountants name and address _____

Please list all sources of income you receive _____

