[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. 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: _____

Contact name: _____

Phone: _____

Email: _____

Address: _____

Entity type: _____

Year end: _____

VAT registered: _____

Services required: _____

Previous accountant: _____

Sign-off

Client: _____ **Partner:** _____ **Date:** _____