

## What to bring to your initial meeting

The initial meeting gives you a chance to get to know me and vice versa. It gives me an idea of the services you require and how long it will take me to complete the work for you. This means that I can give you a fixed rate quote so that you know how much things are going to cost.

### *Personal*

If you are looking for me to complete your personal tax return, I will need to have an idea of the various sources of income that you are reporting. It would be useful to bring along documentation evidencing your income sources. This might include (but is not limited to) any P60 or P11D forms from your employer, interest certificates, dividend certificates, a note of pension contributions made, investment details, child benefit received or details of gift aid donations made. In certain circumstances, it is also relevant to bring along details of your spouse's income as well.

If you already have a Unique Taxpayer Reference with HMRC, please bring a note of this along with your National Insurance number as well.

### *Business and company*

The time taken to produce self-employed or partnership accounts is varied and often depends on the type of information provided to your accountant. If you bring a box of receipts it will be more expensive to process your data than if you provide reconciled data using a bookkeeping system. Please bring along an example of how you will provide data for analysing.

Please bring a note of any HMRC references for Self-assessment, PAYE, VAT or Corporation Tax along as well as your Companies House authentication code (for companies only).

### *Anti-money laundering checks*

If you decide to go ahead based on the quote provided, I will need to complete identity checks to satisfy Anti-money laundering legislation. Please bring along your passport or photo driving licence plus a second document showing your address so that I can confirm your identity. If you don't have a passport or driving licence, please contact me on 07597 546 030 to discuss other valid identification documents. Please also note that identity check needs to be completed for all partners in a partnership and all directors of a company.

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