Meridian Accounting Services Ltd

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:** _____