

# TAX AHOY LTD

www.taxahoy.com

contact@taxahoy.com

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## NEW CLIENT FORM

### PERSONAL DETAILS

TITLE	_____ (Mr. Mrs. Miss. Dr. etc)
FORENAME(S)	_____
SURNAME	_____
ADDRESS	_____ _____
POSTCODE	_____
TEL NO	_____
EMAIL	_____
DOB	_____
NATIONAL INSURANCE NO	_____
UTR NO	_____
DISCHARGE BOOK NO.	_____

### MARITAL DETAILS (needed for Married Couples Allowance if applicable)

MARITAL STATUS	_____ (Married, Single, Widowed etc)
SPOUSES FULL NAME	_____
NATIONAL INSURANCE NO	_____
DOB	_____

### FINANCIAL INFORMATION REQUIRED (for completion of Tax Return)

DO YOU RECEIVE;			
1.CHILD BENEFIT	YES / NO	DO YOU HAVE A STUDENT LOAN?	YES / NO
2.BANK / BUILDING SOCIETY INTEREST	YES / NO	DO YOU HAVE A PERSONAL PENSION?	YES / NO
3.INCOME FROM SHARES, UNIT TRUSTS	YES / NO	PENSION PROVIDER	_____
4.INCOME FROM PROPERTY RENTAL	YES / NO		
5.INCOME FROM A LIMITED COMPANY	YES / NO	ARE YOU IN RECEIPT OF A PENSION?	YES / NO
WHERE YOU ARE A DIRECTOR.		PENSION PROVIDER	_____
6.INCOME FROM A PARTNERSHIP	YES / NO		
WHERE YOU ARE A PARTNER.			
7.INCOME FROM TRADING AS A SOLE TRADER.	YES / NO		

### TAX

ARE YOU OWED TAX	YES / NO	DO YOU OWE TAX?	YES / NO
ANY CURRENT TAX PROBLEMS?	YES / NO		
If yes, brief details _____			
_____			
_____			

APPROXIMATE DATE AND AMOUNT OF LAST TAX REFUND IF ANY \_\_\_\_\_

### EMPLOYMENT DETAILS

JOB TITLE	_____
NAME OF EMPLOYER	_____

**BANK DETAILS (for completion of Tax Return)**

IF YOU THINK THAT YOU ARE LIKELY TO BE DUE A REFUND, PLEASE COMPLETE YOUR BANK DETAILS

BANK \_\_\_\_\_  
ACCOUNT HOLDER \_\_\_\_\_  
SORT CODE \_\_\_\_\_  
ACCOUNT NO \_\_\_\_\_

I hereby authorise Tax Ahoy Ltd. to act on my behalf with regard to self assessment tax only. I will supply all relevant information that is requested in order for Tax Ahoy Ltd. to file my returns by the filing dates. I agree to pay the sum of £210.00. By signing, you also give consent to Tax Ahoy Ltd. to hold your data according to the GDPR Regulations 2018.

\_\_\_\_\_

Signature

\_\_\_\_\_

Date

**FURTHER INFORMATION REQUIRED**

- \* Details of your last four years of sea service. A photocopy of your discharge book will suffice if all the travel is in foreign waters.
- \* If travel is in British waters then please provide dates in and out of the twelve mile limit for the current year.
- \* Please provide details of foreign holidays in the current year.
- \* ID documents - please see separate list of required documents.
- \* You will also need to complete HMRC's forms SA1 and 64-8 to enable us to act on your behalf with HMRC.

These are downloadable from our website or alternatively, please ask us to email them to you

**Once completed, please post to us. HMRC will only accept the original documents.**

**WHAT TO DO NOW**

All documents, including those for ID purposes can be emailed to us with the exception of **this form** and **HMRC forms SA1 and 64-8** which must be posted to us at the address below.

**HOW TO PAY**

By cheque made payable to 'Tax Ahoy Ltd' and posted to the address below or by direct bank payment. Our bank details are;

Tax Ahoy Ltd                      **Account No; 33550435**  
Barclays Bank                    **Sort Code; 20-45-45**

**Tax Ahoy Ltd.  
The Old Farmhouse  
South Carr Farm  
Westwoodside  
Doncaster  
South Yorkshire  
DN9 2EW**

Please tick as appropriate;

- I enclose a cheque for £210.00.
- I will make a direct bank payment for £210.00 within the next 7 days.
- I want you to email an invoice to me.

Please tick here  if you require information regarding financial planning including (but not limited to);

Mortgages  
Savings & Investments  
Pensions  
Trusts  
Life & Health Insurance

**By doing so, you are authorising us to forward your details to an independent third party which is regulated by the Financial Conduct Authority (FCA) and who will contact you to discuss your requirements.**

