

**Accountant’s Report**

**Sole Trader or Partnership**

Your client(s), named below, has/have authorised us to approach you for a reference. Please complete this form and return it with 3 years’ personal tax computations via email: intermediaries@themarsden.co.uk or by post: Lending Services, Marsden Building Society, Principal Office, 6-20 Russell Street, Nelson, Lancashire BB9 7NJ.

All information will be treated with confidence.

**The applicant(s)**

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Applicant(s) name(s):

Business name:

Nature of business:

Year established:

# Extraction of accounting information

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
|  | Year Ended: |  | Year Ended: |  | Year Ended: |  |
| Actual/Estimate | Actual/Estimate | Actual/Estimate |
| Turnover: |  |  |  |
| Gross profit: |  |  |  |
| Net profit: |  |  |  |
| Drawings: |  |  |  |
| Current assets: |  |  |  |
| Current liabilities: |  |  |  |
| Fixed assets: |  |  |  |
| Depreciation: |  |  |  |

|  |  |  |
| --- | --- | --- |
| Please confirm the applicant's shareholding percentage:  |  | % |

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
|  | Year Ended: |  | Year Ended: |  | Year Ended: |  |
| Applicant’s gross taxable income: |  |  |  |
| Other applicant’s business: |  |  |  |
| Details of income from other sources: |  |  |  |
| Tax/NI contributions paid: |  |  |  |
| Net income: |  |  |  |
| Other relevant information: |  |  |  |

# PLEASE PROVIDE 3 YEARS’ PERSONAL TAX COMPUTATIONS (SA302s and Tax Year Overviews if UK Tax Returns)

**Approval notes: I/We certify that the information provided is correct.**

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Name:

Address or office stamp:

How long acted for client(s):

Qualifications (acceptable bodies include ACA, FCA, ICAEW, ICAS, ACCA, FCCA, IPFA, ATT, AAT, CIOT, AIA):

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|     |

Signature:

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|  |

Date: