

BLUESTONE WEALTH MANAGEMENT

ACCOUNTANTS CERTIFICATE

Account number:

Customer [Your Client] Name: *Where the business is held in the joint names of more than one customer (e.g. husband and wife), or the customer has more than one business please complete a separate Certificate for each customer / business.*

Trading As:

Nature of Business:

Business Address:

Has your client traded continuously over the last 12 months? YES / NO

How long has your client been trading?

How long have you acted for your client?

Clients NI number: Tax Office and Reference number:

Business Structure: Sole Trader / Partnership / Limited Company

Position in Business (e.g. Director):

Percentage Shareholding: %

Please confirm your clients income from the business during the last three years. For less than
three years trading, please provide a minimum of the latest two full years trading figures.

[Company Performance] For all Business Structures			For Sole Trader / Partnership	For Limited companies	
Year Ending	Annual Turnover	Net Profit (before personal tax, after any business tax)	Client's Drawings	Client's Directors Salary	Client's Dividends (Net)
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Have these figures been agreed with HMRC? YES / NO * if No please state why

Please explain any fluctuation in turnover and/or net profit in any one year:

Please give details of your client's income from other sources:

Please give your opinion whether the business is financially sound and generating sufficient income to meet all your client's commitments including the proposed mortgage payment:

I confirm that the above figures provide a true and accurate summary of my client's income. I confirm that as far as I am aware there have been no adverse material changes to the business to date.

Accountancy Firm Name:

Address:

Tel No: Company Stamp

Email:

Signed:

Print Name: Date:

Membership Number: Registered in Firm Name or Individual Name (please specify)

Accountant Qualification: (Please tick appropriate box)
 The qualifications listed are acceptable under the Society's lending policy. If one of these qualifications is not held the Society will require HMRC SA302 forms.

ACA/FCA (Institute of Chartered Accountants)
 ACCA/FCCA (Association of Chartered Certified Accountants)
 ACMA / FCMA (Chartered Institute of Management Accountants)
 CPFA (Chartered Institute of Public Finance Accountants)
 AAPA (Association of Authorised Public Accountants)