

PETER CHALK & CO

To register as a client please complete this in as much detail as possible and return it to Peter Chalk & Co, PO Box 6607, Grantham, Lincs, NG31 7NR Telephone: 01476 591333

NEW CLIENT (Please write clearly in BLOCK CAPS)

Surname Christian Name(s).....
Title

Address Own House or Provided house
..... Or Rented house (if paid personally)
..... OPR
.....
..... Postcode.....

Telephone E-Mail.....
Mobile Skype

Venue

Denomination
Vicar/Rector/Curate/PiC/Minister/Other..... How many Tax Returns outstanding.....*
Curates - date of ordination as Deacon/...../.....

Payroll start date (VERY IMPORTANT).....

Source

If recommendation - by whom Name
Ref

Single/Married/CP Partner Christian Names.....
Approximate level of partner's income £..... Date of marriage/...../.....

Client DOB/...../..... Property Income Yes/No
Partner date of birth/...../..... If Yes - is it mortgaged? Yes/No
NINO/...../...../...../.....
UTR

Any children under 20? Yes/No

Dividend income Yes/No If Yes - shares in more than 8 companies Yes/No

Any other unusual sources of income
.....

PCC OFFICE USE ONLY

PCC Reference Number
File opened Initials Date .../.../...
M.L. Initials Date .../.../...
Digita Initials Date .../.../...
New Client Register Initials Date .../.../...
Smart Server Initials Date .../.../...
PCC Initials Date .../.../...
Reg on HMRC YES/NO

Card Payment details for Registration Fee

Card Type.....
Card No
Name on Card.....
Exp Date..... Security Code.....
Amt to pay..... Invoice No.....

NOTES (PLEASE CONTINUE ON REVERSE)

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