

BR & J Partners LLP – New Client Enquiry Form

1. Business Information

Business / Trading Name: _____

Registered Company Name (if different): _____

Company Registration No.: _____

Trading Address: _____

Registered Office (if different): _____

VAT Number (if applicable): _____

Nature of Business / Sector: _____

Website (if any): _____

2. Contact Details

Main Contact Name: _____

Position / Role: _____

Email Address: _____

Phone Number: _____

Preferred Contact Method: ☐ Email ☐ Phone ☐ Other: _____

3. About Your Business

Year Established: _____

Average Monthly Transactions (Sales): ☐ <250 ☐ 250–1,000 ☐ 1,000+

Average Monthly Transactions (Purchases): ☐ <250 ☐ 250–1,000 ☐ 1,000+

Number of Employees: _____

Annual Turnover (approx.): £_____

Current Bookkeeping / Payroll Software (if any): _____

Current Accountant / Finance Support (if applicable): _____

4. Services of Interest

- ☐ Essentials Package (Bookkeeping, VAT/CIS, Payroll, Reconciliations)
- ☐ Premium Package (Full management accounts, forecasting, supplier management)
- ☐ Business Planning Consultancy
- ☐ HR & Policy Documentation Support
- ☐ Financial Mentorship / Coaching
- ☐ AML / GDPR / Compliance Support
- ☐ Company Formation or Setup Services
- ☐ Custom Project or Advisory Retainer

Other (please specify): _____

5. How Did You Hear About Us?

- ☐ Recommendation ☐ Website ☐ LinkedIn ☐ Social Media ☐ Event ☐ Other:

6. Additional Information / Notes

(Please tell us a little about your current setup, any specific challenges, or what you're looking to achieve.)

7. Declaration

I confirm that the information provided above is accurate to the best of my knowledge and understand that submission of this form does not constitute a formal engagement until an agreement is signed.

Signature: _____

Name: _____

Date: _____