

Financial Details

Self Employed Sole Trader/Partner or Director of a Limited Company

1	Please give the trading name and address of your business or company.
2	What period does your last set of accounts run from and to?
3	<p>Please state the net profit of your business during the following:</p> <p>i) The last accounting period</p> <p>ii) As noted on your last tax return</p> <p>Please supply your latest self assessment tax return and SA302 or agreed notice of assessment and a certified copy of the accounts which relate to this.</p> <p>Do you wish us to contact your accountant direct for this required information: YES/NO (Any fees charged for the supply of this information will be at your expense).</p>
4	Will your business continue to trade?
5	Will you continue to receive any profits or income, including dividends from your business whilst you are incapacitated? If yes, please state how much you will receive and for how long.
6	Will you receive any other income during your incapacity? (E.g. pension payments, other insurances, DWP etc.)
7	Has anyone been employed to replace you during your incapacity? If yes, please give details of their hours and pay.
8	Please provide the name and address of your accountant or person who usually deals with your accounts/tax return.
9	<p>If you are a partner please provide the following:</p> <p>i) The number of partners in your business</p> <p>ii) What percentage of profits each partner receives</p>

	<p>iii) Please provide a copy of the partnership agreement. If no agreement exists, what arrangements have been made for your absence? i.e. financial arrangements, locum cover etc. Please provide a copy of the last partnership appropriation account.</p>		
10	<p>If you are a director of a limited company, please provide the following:</p> <p>i) How long have you been a director?</p> <p>ii) How many staff your company employ?</p> <p>iii) Do you receive dividends? If yes, what amounts have you received in each of the last 3 years?</p> <p>iv) Please send us a copy of your last P60</p>		
11	<p>Are you a director of any other company?</p>		
SIGNATURE		DATE	