Your accountant switching pack

Everything you need to make moving accountants simple

Accountant switching checklist

Before you move

☐ Think about what you'd like from your new accountant.

☐ Arrange an initial meeting with LKA.

☐ Review the services you currently receive.

☐ Check whether you have any outstanding invoices with your existing accountant.

Information you may need

- Company name
- Company Registration Number
- UTR (Unique Taxpayer Reference)
- VAT Number (if applicable)
- PAYE reference (if applicable)
- Details of your accounting software
- Recent accounts (if available)

What LKA will do

✓ Contact your previous accountant.

✓ Request Professional Clearance.

✓ Obtain your accounting records.

✓ Arrange HMRC authorisation.

✓ Transfer your accounting software where required.

✓ Ensure all future deadlines are managed.

✓ Support you throughout the transition.

Template email

Subject: Appointment of new accountants

Dear [Accountant's Name],

I hope you are well.

I am writing to let you know that I have appointed **LKA Chartered Accountants** to act as my new accountants with immediate effect.

Thank you for the services you have provided to date.

Please accept this email as authority to liaise directly with LKA Chartered Accountants regarding the transfer of my accounting and tax affairs, and to provide them with the relevant information and professional clearance required to facilitate a smooth handover.

If there are any outstanding matters that require my attention, please let me know.

Thank you for your assistance and I wish you all the best for the future.

Kind regards,