

LEAD DETAILS BOOKED BY ACCOUNTANCY STRATEGY

Contact name	Sophie
Position	Director (4 Directors in total)
Business name	Company B
Town	Nottingham
Type of business	Laboratory Services
Year end	February 28 th
Turnover	100k per month (company started in 2004)
Telephone	01155 729 183
Mob	07753 258 963
Email	info@company_b.com
Website	www.company_b.com
Business	<input type="checkbox"/> Sole <input type="checkbox"/> Part <input checked="" type="checkbox"/> LTD Co <input type="checkbox"/> Other
Existing accountant	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
Reason for looking	Keen on looking at tax strategies

Other information

Spoke to Mr Collins, one of the Directors on the 20th July. He was interested in tax planning and strategies. The timing of our call was apt - He was keen for Accountant Y to speak to Sophie, one of the other Directors, on the 27th. Sophie confirmed the interest, and is happy to speak to Accountant Y and how they may be able to help. She also mentioned that their current accountant is not pro-active and does not look at tax strategies to help them. She didn't seem enthusiastic about their accountant.

Suggested action

Accountant Y to call Sophie on her mobile (as she suggested) as soon as possible to arrange a meeting. I thought this would be best as Accountants Y availability may have changed during the week and this will also give Accountant Y the control to make his own arrangements and time to research and find info about them at Companies House. I would suggest that if handled correctly, this company will probably want to have Accountant Y as their accountant.

Day time and date of appointment	TBA
Partner attending meeting	Accountant Y
Appointment letter sent	N/A
Call made by:	Simon
Date:	27th July 2011

Please note

This is a genuine lead booked for one of our existing accountancy firms. The contact details have been amended for client confidentiality.



:: Accountancy Strategy, 76 Castle Lane West, Bournemouth, BH9 3JU ::

:: T: 01202 526582 ::

:: W: www.accountancystrategy.co.uk ::

:: E: info@accountancystrategy.co.uk ::