

Dear

Terms of Business Letter for Accountancy Clients

1. This letter states the Terms of Business between Huw Roberts and
2. Huw Roberts is licensed by the Chartered Institute of Management Accountants to work in practice.
3. The work as a practicing accountant can include the preparation of accounts and Income Tax Returns, Capital Gains Tax calculations, VAT returns and appropriate tax calculations. The list is not exhaustive and other services may be offered on an ad hoc basis as and when required.
4. Huw Roberts has Professional Indemnity Insurance which complies with the Professional Indemnity Regulations of CIMA.
5. Huw follows the fundamental principles in the Code of Ethics which states “An Authorised individual has a continuing duty to maintain professional knowledge and skill at the level required to ensure that a client or employer receives competent professional service based on current developments in practice, legislation and techniques. An Authorised Individual should act diligently and in accordance with applicable technical and professional standards when providing professional services.”
6. In the event of unforeseen circumstances which lead to Huw Roberts being unable to complete the required work, arrangements are in place to transfer the work to an alternate practitioner,
Mr Laurence Cohen, Gordon Down and Co, Temple Court,
13 Cathedral Road, Cardiff CF11 9HA, 029 2078 6633

7. **Privacy and GDPR Policies**

- a. All work is carried out in strict confidence.
 - b. No personal details will ever be supplied to other parties without the consent of the client.
 - c. At the request of the client, personal data will be transferred when information and documents are submitted to public bodies such as HMRC.
 - d. When working with solicitors or other professional firms, information will only be forwarded following the agreement and request of the client.
 - e. Accountancy and payroll work which is sub-contracted will only be forwarded to trusted third parties with the agreement of the client.
 - f. Information will only be supplied to third parties such as mortgage references at the request of the client.
 - g. Where Anti Money Laundering checks are required by my Regulatory Bodies, I will obtain client permission before carrying out any electronic check of your identity.
 - h. If you wish to opt-out of receiving my monthly newsletters or any other type of online information from myself, please let me know
8. Client records will be kept for a period of 6 years after the conclusion of the work.
9. If you would like to talk to me about how I could improve my service to you, or if you are unhappy with the service you are receiving, please let me know. I will consider carefully any complaint you may make about the work as soon as it is received it and do all I can to resolve it. I will acknowledge your letter within five business days of its receipt and endeavour to deal with it within eight weeks.

10. Fees will be charged at the rate of £ per hour + VAT. A full timesheet will be kept and made available at any stage.

If the above terms are satisfactory, I would be grateful if you could sign and return the enclosed copy of this letter which will then be placed on your file.

Yours sincerely

HUW ROBERTS

I/We

sign and return this copy of the Letter of Engagement, confirming that I am/we are agreeable to you acting on my/our behalf.

Signed

Date