Professional clearance letter template

[Your firm name], [address], [email and phone]

[Date]

[Previous accountant's name], [firm name], [firm address]

Dear [name],

Professional enquiry

Client	[Client name]
Business	[Business or company name]
Company number	[Company number, if a company]
UTR	[Unique Taxpayer Reference]
Other references	[VAT number and PAYE reference, if relevant]

[Client name] has asked us to act as their accountant from [date] for [services, for example annual accounts, Corporation Tax and VAT]. They have authorised us to contact you and you to discuss their affairs with us. Their signed authority is below.

Before we accept the appointment, please tell us whether there is any professional reason why we should not act, or anything we should be aware of in deciding whether to accept it.

To ensure continuity of the client's affairs, please also send us: (1) a copy of the last set of accounts formally approved by the client; (2) a detailed trial balance agreeing to those accounts; and (3) [any client records you need, for example the latest tax returns and computations, open HMRC correspondence, payroll and VAT records].

We would be grateful for your reply by [date]. Please let us know if you would prefer to send records by post or secure upload.

Yours sincerely, [signature]

Name: [Name and professional qualification]

For and on behalf of [firm name]

Client authority

I authorise [previous accountant's firm] to discuss my affairs with [new accountant's firm] and to provide them with the information requested above.

Signed: [Client signature]

Name: [Client name]

Date: [Date]

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Guidance and the latest version: https://www.countify.co.uk/resources/templates/professional-clearance-letter