

NEW CLIENT APPOINTMENTS ORDER FORM

Contact name: _____ Practice name: _____

Address: _____

Phone No: _____ Fax No: _____

Mobile No: _____

Email: _____ Web Site: _____

Are you Ltd/Sole /Partnership: _____ Time practice established: _____

Please give partners names and their ages: _____

Number of staff: _____ Number of other offices: _____

Type of practice - Chartered/ Certified or Other: _____

Please specify the geographic area in which you would like your appointments (if possible by postcodes):

Please briefly describe the location of your office as if you were briefly telling a stranger where you are located, or a landmark close by:

Please specify the ideal type and size of industries you want the directories we acquire to specify. You should note the directories are a good guide only and are not always 100% correct

Would you like us to exclude regulated industries, such as Solicitors, Insurance Brokers, Charities, etc when ordering data on your behalf, or are there any other types of trade that you do not want us to include:

We will automatically send you the list of names & companies that we will be contacting before we commence work. The directories will come to you by e-mail within 5 days for vetting before we commence calling in order that existing clients and clients you do not wish us to contact can be deleted before returning to us.

You do of course have the option of providing your own data if you would prefer.

At the beginning of each week the Accountant must advise Advance-Xtra of any unavailable dates for the current and following week. A minimum of 2 hours will be left between appointments and a maximum of 4 made on any one day.

Please advise us of any days when you will definitely not be available such as holidays or other things already arranged (Advance Xtra will provide diary).

We also offer an optional follow up service for accountants at a price of £35 per follow up for unlimited calls to obtain the clients feedback and to see if the client would like to have another meeting. These follow-ups can result in a 2nd meeting being arranged which generally result in the client signing up. Would you like to include this service?

Can you do evening (after 6.00pm) or weekend appointments if for any reason requested by the clients?

Would you be prepared to pay Advance a commission of 10% if you achieve a realistic target of new fees from Advance-Xtra meetings within 12 months of the date of signing hereof?

Who will be Advance Xtra's point of contact?

With regards to offering a guarantee on completing accounts on time (on the basis the clients provide full information when requested) what time period are you prepared to guarantee from receipt of records. How to operate this guarantee so you never have any client difficulties is covered in our manual. We have over 40 practices offering 20 working days or 100% of their fees refunded and not one has ever had to refund a client or penny or had any unhappy clients as a result. This guarantee helps to immediately demonstrate to the clients that you are client orientated and we have been using for over 8 years now:

20 working days/ 30 working days/ 40 working days/ other?

If you fail in doing this for the client what proportion of the fees would you waive?

Are you a member of Results (Boot Camp), Added Value Solutions, 20/20 Consulting or any similar added value orientated organisation and if so please briefly explain how much of their way of doing things you take on board:

Signed: _____ (authorised signatory) Date: _____

(The Accountant)