

ADVANCE XTRA COMPANY FACT FIND

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| AX ALLOCATED PRACTICE: | Jolliffe Cork |
| YOUR APPOINTMENT REF NO: | AX-100 |
| THE GRF VALUE OF THIS PROSPECT CONVERSION IS BETWEEN: | £30,000 & £40,000 |
| THE COMPANY ANNUAL TURNOVER OF THIS BUSINESS IS: | £1.2 MILLION |
| COMPANY NAME: | ABC LTD |
| NAME OF CONTACT: | Mr C. Cowap |
| MEETING DATE & TIME : | Friday 22nd October at 10am |
| PROSPECTS ADDRESS & POSTCODE: | Highfield Road, Old Malton, YO1 7DB |
| DISTANCE FROM ACCOUNTANTS OFFICE TO PROSPECTS OFFICE: | 19 Miles |
| Business Sector: | National Charity |
| Company Type: | Trust |
| Position In Company: | Accounts Co-Coordinator - SDM |
| Telephone Number: | 01653 694385 |
| Prospects Mobile No: | Did not discuss |
| Email Address | crofthouse@fsmail.com |
| Company Web Address: | www.camphill.org.uk |
| How Many Years Has The Business Been Trading For: | 34 Years |
| Company Year End (Month): | March |
| Number Of Employees, Part/Full Time + Directors: | 28 |
| Are Accounts Reconciled & Up To Date (IE) Bank Accounts, VAT, Debtors, Creditors: | Yes |
| Who Are Your Current Accountants/Auditors & Are They Local: | Mazars + Local Firm |
| How Often Do You Meet, Or Have Contact With Your Current Accountant: | Once a year if we are lucky |
| Are Your Current Fees Higher Or Lower Than £1,500: | Yes |
| On a Scale of 1 to 10 What Would You Rate Your Own Accountant In Terms of Value: | 6 |
| Do You Require Book-Keeping Services , Such As Payroll & Vat: | Yes |
| Do You Require An Audit, If Yes, What Are Your Current Fees For This: | Yes |
| Which Accounting System Do You Currently Use or Have In Place: | Sage |
| Will The Prospect Have a Set Of Accounts Available For The Meeting: | Yes, will have accounts to hand for meeting |
| Will The Prospect Change, or Consider Changing Accountants If We Can Show Them Any Financial Gain or Benefit At The Meeting? | Yes, he said he would consider changing accountants if the acct can show him any financial gain. |
| <u>CONVERSATION HISTORY & NOTES:</u> | |
| <p>I spoke to Ian who advised me that the charity is a non-profit company limited by guarantee. There are 15 staff based at Old Malton. The majority of other staff are self-employed volunteers (about 18 in total). He also told me that they pay separate fees for the preparation and for the audit of £18k + £15k so are paying a total of £34k. He told me that they use 2 different firms, one been a local practice that does the pre-audit for (£15,000), and the other is Mazars who actually do the audit. Ian went on to tell me that things have gone a bit sour with the local firm they use, and he no longer wants to use Mazars to do the company audit based on the high fees and lack of service etc.... Ian told me that the company turnover is about £1.2 million, an said he would like just 1 firm of accountants to deal with everything now and that he is looking to change his arrangements as soon as possible if he is happy with the service and fees been offered to him. Ian also confirmed that the business is VAT registered, and that they also require book-keeping services to deal with the payroll etc....He told me that the business has been trading since 1976 and is very well know in the industry</p> | |
| SPECIAL FOCUS POINTS OF INTEREST FOR PROSPECT: | Competitive Audit Fees/ Business Advice/IT |

Complaints About Our Service:

We want to hear from you if you feel unhappy about the service or quality of appointments you have received from us. Letting us know your concerns gives us the opportunity to put matters right for you and improve our service to all our accountants. If you have a reason to complain you may do so in writing by post, email or by telephone. Details of our complaints handling procedures are available on request.