



aspen waite
TRUSTED ADVISORS

The following terms form the basis of our business relationship. If you have any queries or disagree with these terms please contact Michelle Mienie (General Manager of Aspen Waite South Ltd)

Fees

Basis of fees

1. The majority of our work is undertaken on a fixed fee basis where the fee is quoted in a fixed fee agreement prior to the commencement of work on your behalf.
2. If our work with you is not governed by a fixed fee agreement, we will wherever possible provide you with a quote before we undertake any ad-hoc work or projects.
3. Whenever a quote cannot be provided, the fee will be based on the seniority and expertise of the persons carrying out the work along with the time spent on it.
4. If we receive your accounting records within two months of your statutory filing deadline the fee level will be commensurate with the seniority, professional expertise and time of the persons engaged in performing the work.

Payment of fees

1. Fees for work that is subject to a fixed fee agreement will be payable by monthly instalments through Go Cardless, or as set out in the fixed fee agreement.
2. All work that is not subject to a fixed fee agreement, including work quoted for, will be invoiced monthly or on completion of the project.
3. All invoices are due for payment 28 days from the date of the invoice. Interest will be charged on late payment at the current Bank of England base rate plus 5%.
4. Non payment of fees may result in work being suspended until payment is received.

Confidentiality

We confirm that all information provided by you or third parties on your behalf will be kept confidential, subject to legal and regulatory requirements.

Professional indemnity

Aspen Waite South Ltd holds a professional indemnity insurance policy.

Complaints:

Should you have a complaint please contact Michelle Mienie in the first instance. We undertake to look into any complaint carefully and promptly and to do all we can to explain the position to you. If we do not answer your complaint to your satisfaction you may, of course, take up the matter with the Institute of Chartered Accountants.

Contact details:

- Michelle Mienie, Boston House, Grove Business Park, Wantage, Oxon, OX12 9FF
Email michelle.mienie@apsen-waite.co.uk Tel: 01235 766162
- ICAEW, Level 1, Metropolitan House, 321 Avebury Boulevard, Milton Keynes MK9 2FZ
Tel: 01908 248 100

Receiving communication & conforming to GDPR regulations:

All confidential information (i.e. Accounts, Tax return etc) **will be sent to you via our online secure portal**. You will receive an initial request to set up your portal account when we send you your first confidential document, **if you prefer to receive your confidential information by post instead of the portal please do inform Aspen Waite.**

Changes to data protection regulations mean that you need to tell us that you are happy to receive our communications. From time to time, we may send you communications to help you keep up-to-date with the latest regulatory news in the accounting industry or information on relevant products, services and special offers, which can benefit you. We may contact you via email, post or phone. To confirm that you consent to receiving this information please tick the box confirming which information you would like to receive:

Monthly NewsWire

Tax reminders personal

Tax reminders companies

If you prefer not to receive any of the above updates please tick this box

I confirm that I have read and understood the above terms and conditions and agree to these terms and agree for Aspen Waite South Ltd to proceed with the services quoted.

Print Name: _____

Signature: _____

Date: _____

Company Name: _____

Aspen Waite South Ltd, Boston House, Grove Business Park, Wantage, Oxon, OX12 9FF

Tel: 01235 766162 Email: happybusiness@aspen-waite.co.uk