

Setting up your letter of professional clearance

8 Steps

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Created by

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Creation Date

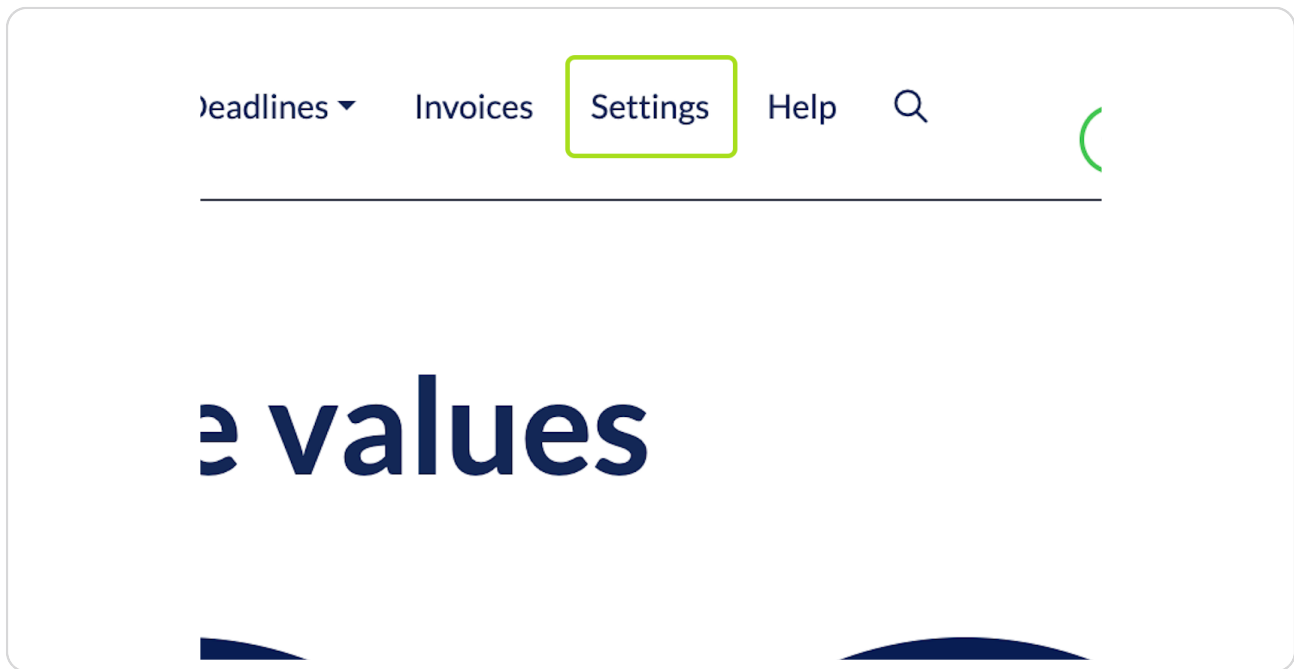
May 23, 2023

Last Updated

May 23, 2023

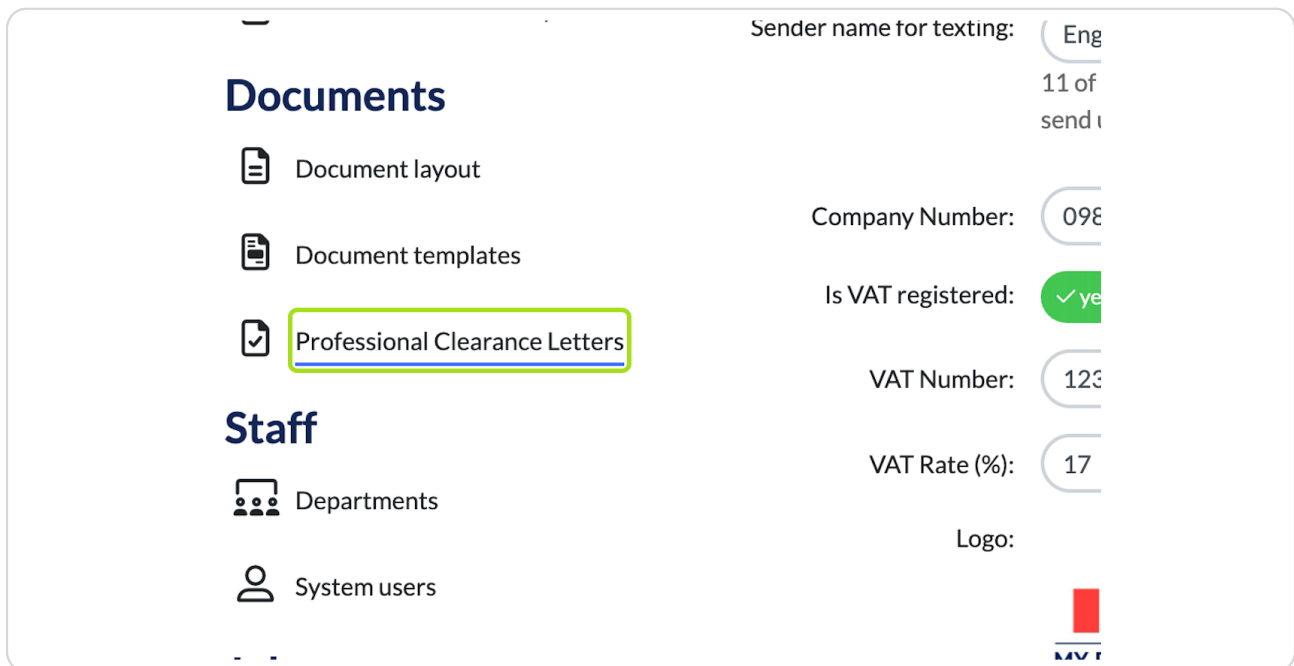
STEP 1

Click on Settings



STEP 2

Click on Professional Clearance Letters



STEP 3

Enter the text for each item you request and details you need from the accountant

on

accuracy

s

Professional Clearance Letters

The points below will be used to generate Professional Clearance Letters you can then send to your accountant to request certain information about the client.

#	Point contents	Applies to:
1	Last full set of accounts submitted to HMRC.	<input type="checkbox"/> all services <input checked="" type="checkbox"/> Limited Company Accounts <input checked="" type="checkbox"/> CT600 <input checked="" type="checkbox"/> Self-employed Accounts <input checked="" type="checkbox"/> Partnership Accounts <input checked="" type="checkbox"/> UK Property Accounts <input type="checkbox"/> SA100 <input checked="" type="checkbox"/> Charity Accounts
2	Capital allowance computation relating to the last set of accounts submitted to HMRC.	<input type="checkbox"/> all services <input checked="" type="checkbox"/> Limited Company Accounts <input type="checkbox"/> CT600 <input checked="" type="checkbox"/> Self-employed Accounts

STEP 4

check the services that this request is relevant to

generate Professional Clearance Letters you can then send to your accountant to request certain information about the client.

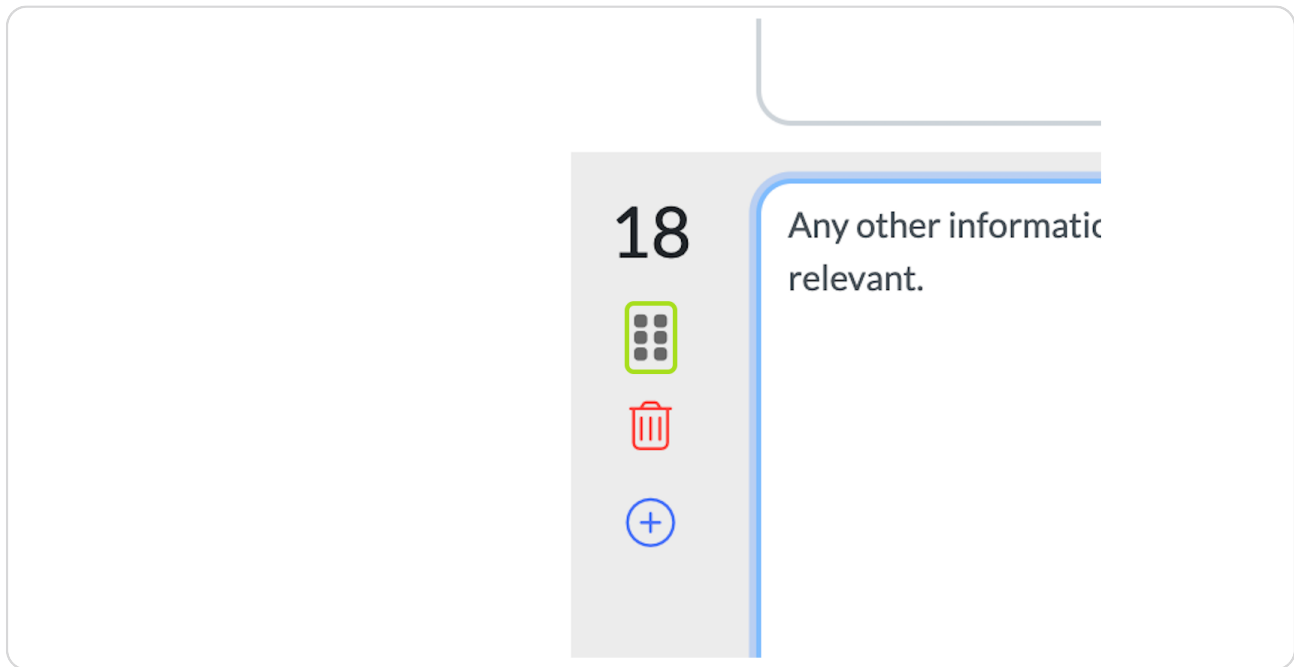
Accounts submitted to

Applies to:

- ☒ all services
- ☐ Limited Company Accounts
- ☐ CT600
- ☐ Self-employed Accounts
- ☐ Partnership Accounts

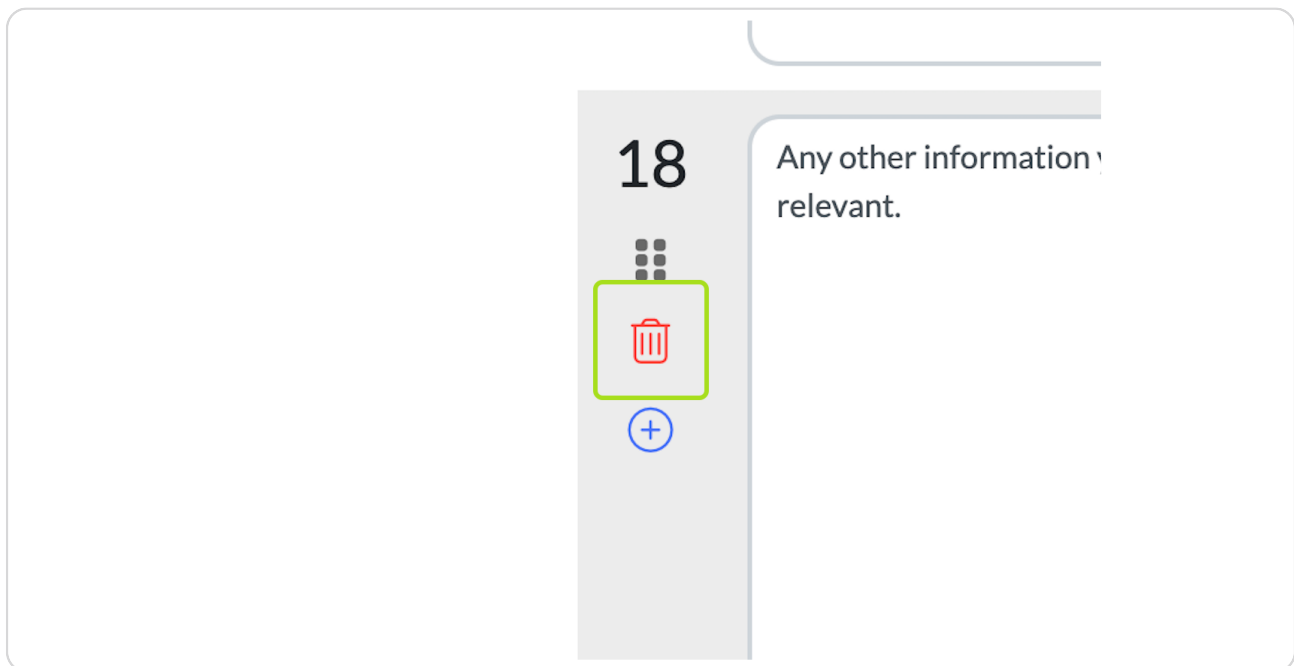
STEP 5

To reorganise the sections click on the 6 dots



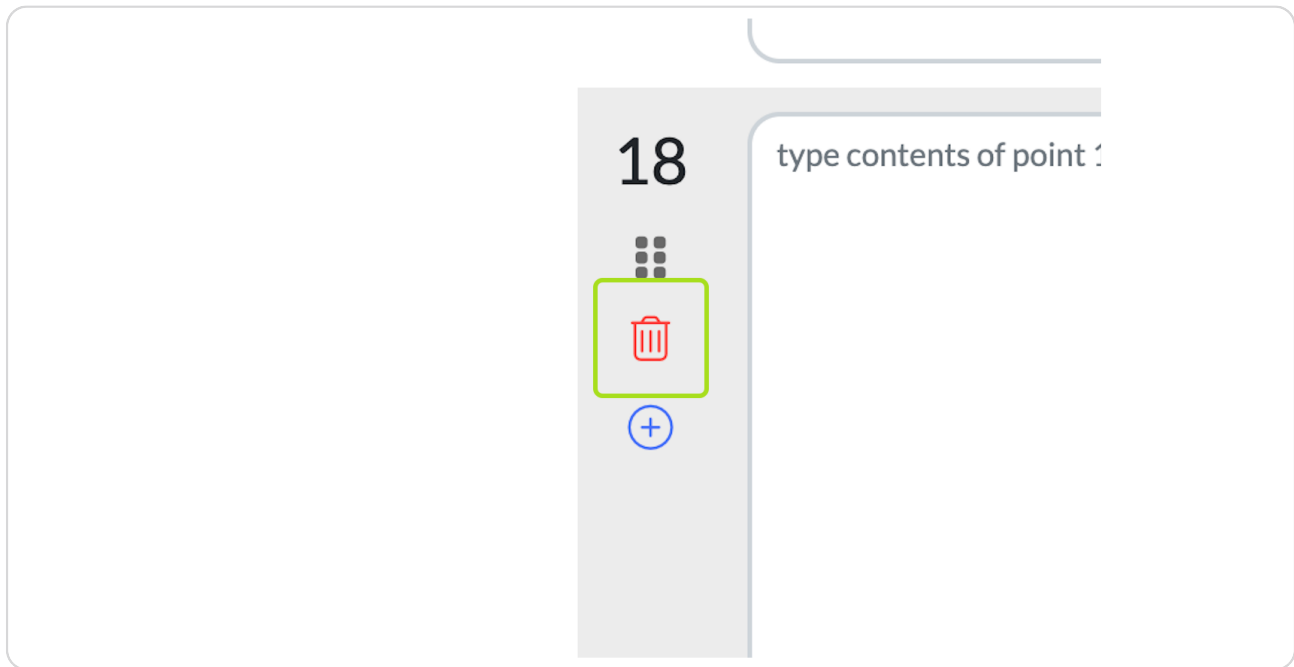
STEP 6

to delete a section select the red bin



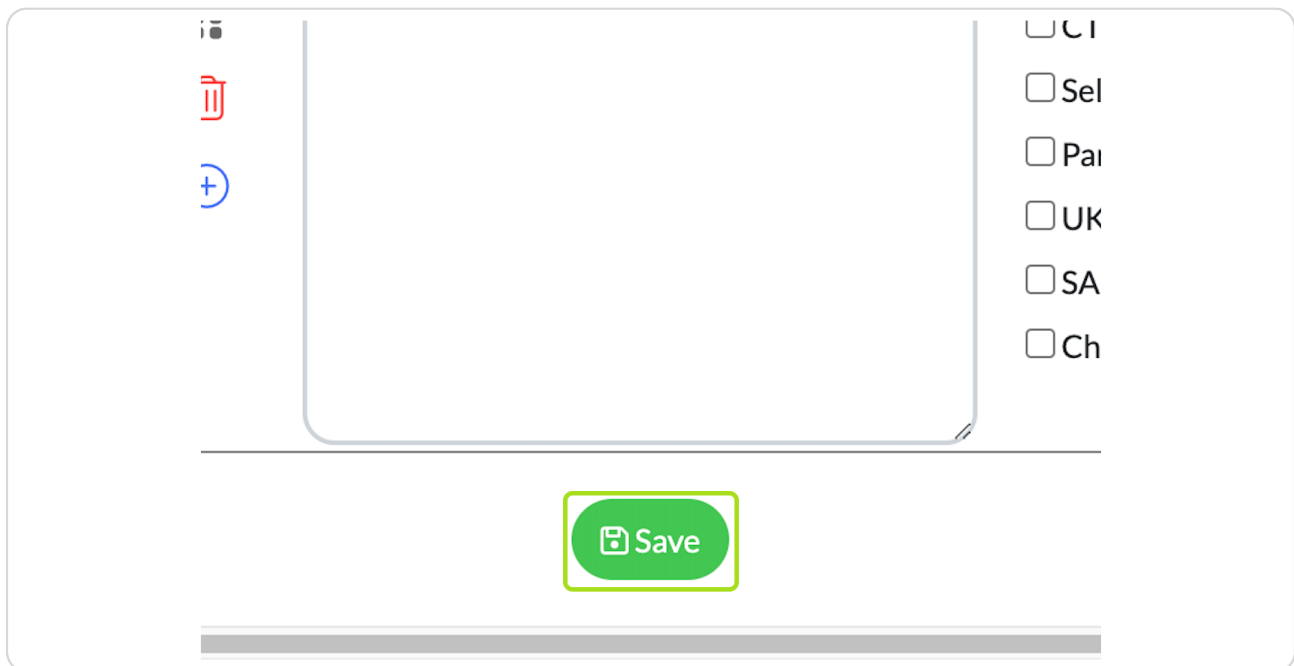
STEP 7

To add a section press the plus symbol



STEP 8

Click on Save



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