

VIVIAN SRAM LIMITED

PRACTICE MERGER CONSULTANTS

QUESTIONNAIRE SALES

FIRM NAME

LOCATION

DATE

REF:
Office Use Only

SECTION I - CONTACT INFORMATION

<i>FIRM NAME</i>	
<input type="text"/>	
<i>CONTACT NAME</i>	<i>CONTACT POSITION</i>
<input type="text"/>	<input type="text"/>
<i>CORRESPONDENCE ADDRESS</i>	<i>WORK TEL:</i>
<input type="text"/>	<input type="text"/>
	<i>MOBILE TEL:</i>
	<input type="text"/>
	<i>HOME TEL:</i>
	<input type="text"/>
	<i>FAX:</i>
	<input type="text"/>
	<i>E-MAIL:</i>
	<input type="text"/>

SECTION II - GENERAL INFORMATION

<i>AGE OF PRACTICE</i>	<input type="text"/>
<i>ANY ASSOCIATIONS WITH OTHER FIRMS</i>	<input type="text"/>
<i>DETAILS OF ASSOCIATIONS</i>	<input type="text"/>
<i>DATE OF YEAR END</i>	<input type="text"/>
<i>ARE YOU REGISTERED FOR AUDIT</i>	<input type="text"/>
<i>ARE YOU AUTHORISED FOR INVESTMENT BUSINESS/CATEGORY</i>	<input type="text"/>
<i>IF YOUR TURNOVER IS BELOW THE VAT THRESHOLD ARE YOU REGISTERED FOR VAT?</i>	<input type="text"/>
<i>PROFESSIONAL INDEMNITY INSURANCE (Y/N)</i>	<input type="text"/>
<i>ANY CLAIMS PENDING UNDER ABOVE</i>	<input type="text"/>
<i>DATE OF LAST QAD VISIT</i>	<input type="text"/>
<i>RESULT OF LAST QAD VISIT</i>	<input type="text"/>

SECTION III - PARTNERS

NAME	<input type="text"/>	AGE	<input type="text"/>
QUALIFICATIONS	<input type="text"/>		
SPECIALISMS	<input type="text"/>		
EQUITY SHARE	<input type="text"/>		

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SPECIALISMS	<input type="text"/>		
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QUALIFICATIONS	<input type="text"/>		
SPECIALISMS	<input type="text"/>		
EQUITY SHARE	<input type="text"/>		

SECTION IV – CLIENT INFORMATION

TURNOVER

PROFIT

NUMBER OF CLIENTS

AVERAGE FEE SMALLEST FEE LARGEST FEE

LOCALITY/RADIUS OF OFFICE

DOES THE PRACTICE HAVE A PREPONDERANCE OF ANY PARTICULAR CLIENT TYPE

SECTION V - OFFICE DETAILS

LOCATIONS

ARE THE OFFICES LEASED OR OWNED

IF OWNED DETAILS OF OWNERSHIP

IF LEASED:

HOW LONG IS THE LEASE/ANY BREAK CLAUSE

WHAT IS THE TOTAL COST P.A.

HOW MANY SQUARE FEET

HOW MANY MORE STAFF COULD YOU ACCOMMODATE

SECTION VI - DAY TO DAY RUNNING

WHAT SOFTWARE DOES THE PRACTICE USE FOR:

AUDIT/ACCOUNTS

TAX

OTHER (SPECIFY)

AVERAGE PARTNER CHARGE-OUT RATES

AVERAGE WORK IN PROGRESS AVERAGE DEBTORS

SECTION VII - STAFF

FULL TIME					
<i>JOB TITLE</i>	<i>AGE</i>	<i>LENGTH OF SERVICE</i>	<i>QUALIFICATIONS</i>	<i>SALARY</i>	<i>CHARGE OUT RATE</i>

PART TIME					
<i>JOB TITLE</i>	<i>AGE</i>	<i>LENGTH OF SERVICE</i>	<i>QUALIFICATIONS</i>	<i>SALARY</i>	<i>CHARGE OUT RATE</i>

SUBCONTRACTORS				
<i>JOB DESCRIPTION</i>	<i>HOURS WORKED</i>	<i>RATE PER HOUR</i>	<i>CHARGE OUT RATE</i>	

CONSULTANTS

SECTION VIII – ANALYSIS OF FEES

SPLIT OF FEES BY WORK TYPE

TOTAL BY NO.	RECURRING WORK	£
	LIMITED COMPANIES (FULL AUDIT)	
	LIMITED COMPANIES (NO AUDIT)	
	PARTNERSHIPS / SOLE TRADERS	
	TAX CASES	
	OTHER (SPECIFY) _____	
	RECURRING WORK TOTAL	
NON RECURRING WORK		
	CONSULTANCY	
	OTHER (SPECIFY) _____	
	NON RECURRING WORK TOTAL	
	TOTAL FEES ACTUAL/BUDGET	

SPLIT OF FEES BY AMOUNT

This section of analysis can be tricky to produce. If you do not have the information easily to hand it can be skipped

TOTAL BY NO.		£
	£0 - 250	
	£250 - 500	
	£500 - 1,000	
	£1,000 - 2,500	
	£2,500 - 5,000	
	£5,000 – 10,000	
	>£10,000	
	TOTAL FEES ACTUAL/BUDGET	

SECTION IX – MISCELLANEOUS

ARE THERE ANY FIRMS OR INDIVIDUALS TO WHOM YOU WOULD NOT WISH TO BE INTRODUCED THROUGH VIVIAN SRAM LIMITED?



*ARE YOU CURRENTLY IN NEGOTIATION WITH ANY FIRM(S) OR INDIVIDUALS?
IF SO WHOM?*



ANY ADDITIONAL RELEVANT INFORMATION

