

# Accountant's Certificate

## Confirming income for all self-employed applicants

Please fill in the form using **BLOCK CAPITALS** and black ink. Tick any boxes which apply.

Newcastle Building Society is able to provide literature in alternative formats. The formats available are: large print, Braille and audio CD. If you would like to register to receive correspondence in an alternative format please visit [www.newcastle.co.uk/alternativeformats](http://www.newcastle.co.uk/alternativeformats) for more information, ask an adviser in branch or give us a call on 0345 734 4345.

- For sole trading self-employed applicants complete Sections A, B and E.
- For self-employed partners of a partnership business complete Sections A, C and E.
- For limited company director(s) (25% or more shareholding) complete Sections A, D and E.

### Section A – as the company's accountant, please clarify the following details.

Name of applicant(s) whose income(s) is/are stated below



Name of the business

Nature of the business

Trading name (if applicable)

Business commencement/incorporation date

D	D	M	M	Y	Y	Y	Y
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Please note:

We require information from the last three years' trading accounts and will only accept income declared in the UK for tax purposes. If you cannot provide three years' figures please provide the reason:

Where two applicants derive income from the same business this form can be completed for both applicants, however, ensure the individual shareholding and income is clear.

### Section B – for sole trading self-employed applicants

Dates of financial year end	Annual turnover	Gross profit before tax	Net profit before tax						
Last completed year <table border="1"> <tr> <td>D</td><td>D</td><td>M</td><td>M</td><td>Y</td><td>Y</td> </tr> </table>	D	D	M	M	Y	Y			
D	D	M	M	Y	Y				
Year 2 <table border="1"> <tr> <td>D</td><td>D</td><td>M</td><td>M</td><td>Y</td><td>Y</td> </tr> </table>	D	D	M	M	Y	Y			
D	D	M	M	Y	Y				
Year 3 <table border="1"> <tr> <td>D</td><td>D</td><td>M</td><td>M</td><td>Y</td><td>Y</td> </tr> </table>	D	D	M	M	Y	Y			
D	D	M	M	Y	Y				

**Section C – for self-employed partners of a partnership business**

Percentage of Applicant's Shareholding

 %

Income details in the following boxes must be based on the applicant's shareholding.

Dates of financial year end	Annual turnover	Gross profit before tax	Net profit before tax	Net profit before tax attributable to applicant
Last completed year DDMMYY				
Year 2 DDMMYY				
Year 3 DDMMYY				

Please note:

Where two applicants derive income from the same business this can be completed for both applicants, however, ensure the individual shareholding and income is clear.

**Section D – for Limited Company Director(s) (25% or more shareholding)**

Registered number of company

Number of shares held by the applicant

 % of distributed profit

Dates of financial year end	Annual turnover	Profit on activities before tax	Profit (after tax and before dividend distribution)	Applicant's salary as director (A)	Applicant's net dividend distribution (B)	Applicant's total income (A + B only)
Last completed year DDMMYY						
Year 2 DDMMYY						
Year 3 DDMMYY						

**Section E**

Please state any qualifications to the accounts or comment generally on any substantial variation in the figures provided:

From preparing the books and/or accounts of the business, I am of the opinion that net profit before tax of the business is attributed to the applicant(s) above.

Name

Date

DDMMYYYY

Accountant's qualification (must hold a UK accountant's qualification)

Accountancy firm and full address

  
  
  
 Postcode

Signature

**We are unable to accept any amendments to this form. Only pages 1 and 2 of this document need to be provided.**

Principal Office: ! Cobalt Park Way, Wallsend, Tyne &amp; Wear NE28 9EJ

Newcastle Building Society is authorised by the Prudential Regulation Authority and regulated by the Financial Conduct Authority and Prudential Regulation Authority. Details are correct as at time of print (May 2021) ADV