



ApproachableAccountants
Chartered Accountants & Chartered Tax Advisers

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Private and confidential

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Dear Client

Thank you for your business, and welcome to Approachable Accountants

I am writing to thank you for your business and to tell you about some changes we are making. The key change we are making now is to rebrand as Approachable Accountants; we also intend to grow the business in future.

The business so far

I set up the practice in 2010, aiming to provide the best client service I could, without compromising my values. I have learned a lot and feel fortunate to have clients who I like, trust and enjoy working with.

The future - Approachable Accountants

We are rebranding to Approachable Accountants to encourage clients to talk to us! Many people are afraid to talk to their accountant, and they sometimes pay more tax than they need to as a result. Please do keep us informed of your plans well in advance, both business and personal, and raise queries with us.

As Approachable Accountants, we remain committed to helping you achieve financial security and peace of mind, while doing business in an ethical way. We will remain accessible and responsive to feedback. We will continue to strive to deliver advice and service of a high quality.

Trust and personal relationships are at the heart of our business and we have defined four clear values to work by. Annex 1 says more about these values and what they mean for you.

Investing in client service

We aim to deliver a valuable service at a reasonable cost. We invest in keeping our knowledge up-to-date and in working efficiently. In particular, we now offer:

- Out-of-hours appointments
- Totally online / telephone service, for those who want it
- Video calls, through Skype or Facetime – this is helping us serve clients who are further away
- Screen-sharing, so that you can see our screen on your computer – this is great for talking you through accounts or tax returns, or sharing tips such as with Excel

- Getting your business records onto a simple, cloud-based system, which we can show you using screen-sharing.

Our new website will have a dedicated client page, which will have links such as to:

- Pay your tax
- Pay your bill
- Log in to upload documents
- Provide feedback on our service

The website will also offer free advice, including information about when tax advice can be particularly important, and useful links.

Please update our contact details

Please note that my email has changed to Lydia@approachableaccountants.co.uk. I am now tweeting as Lydia Ebdon @HelpWithTax – please follow me for tax tips, and other information I hope you will find useful.

A growing team

I am pleased to welcome Julie Brook, who has joined me as a manager. Julie is an experienced, qualified accountant who will be taking further tax exams next year. We will recruit further where we identify high calibre individuals with a strong commitment to client service and to our values.

How you can help us

We are grateful for your continued business, and for your feedback or suggestions about how we can improve, at any time.

We would particularly welcome further testimonials to use on our new website, or any recommendations you can make for friends and family, near or far. Please see Annex 2 to supply a testimonial, and have a chance to win a bottle of wine. Please let us know if there is anyone you think we should contact to see if they would like our help.

Summary

I am excited about the future for Approachable Accountants. We have some great plans and some great clients. Thank you in anticipation of your future support and I look forward to sharing more of our journey with you.

If you have any queries at all, at any time, please do not hesitate to contact me.

Kind regards

Yours sincerely



Lydia Ebdon BSc FCA CTA
Director

ANNEX 1: OUR FIRM'S VALUES

We have defined four values for our firm:

- Ambition
- Clarity
- Individuality; and
- Togetherness.

The table shows what our values mean for how we work with clients and staff.

For clients, we:	Our values	For staff, we:
<ul style="list-style-type: none"> • Work to the highest standards • Support you to succeed • Continually invest to improve our service • Pursue tax saving opportunities 	Ambition	<ul style="list-style-type: none"> • Invest to help them develop • Encourage criticism of internal processes to improve client service or efficiency
<ul style="list-style-type: none"> • Provide clear, well-researched advice • Are rigorously honest • Are transparent on the scope of work and fees 	Clarity	<ul style="list-style-type: none"> • Demand rigorous honesty • Are clear on our aims, values and internal processes • Support staff to develop and maintain technical knowledge
<ul style="list-style-type: none"> • Flex our service to meet your needs • Welcome a range of clients • Strive to put ourselves in your shoes 	Individuality	<ul style="list-style-type: none"> • Expect staff to take individual responsibility for their work • Offer flexible working, subject to client needs • Help our staff work to their strengths
<ul style="list-style-type: none"> • Work with you to support you • Pull out the stops when needed • Have open, two-way conversations 	Togetherness	<ul style="list-style-type: none"> • Work as a team, with strong review procedures and frequent contact • Have shared commitment to our aims and values • Have regard to our wider impact such as on the environment and communities

ANNEX 2: PLEASE PROVIDE FEEDBACK OR A TESTIMONIAL

In returning this feedback / testimonial, you will be entered into a prize draw for a bottle of wine. Please answer as fully as you can.

1) What was the reservation that would have prevented you from choosing to work with us?
2) What have you found as a result of working with us?
3) What in particular do you like most about working together?
4) What other benefits do you enjoy about working together?
5) Would you recommend us? If so, why?
6) Is there anything else you would like to add?
7) Is there anything at all, however small, that we could do to help you better?
Please supply your name and organisation. Please note we may use this on our new website unless you tell us not to.
Finally, please tell us if you prefer red or white wine, in case you win the draw!

MANY THANKS FOR YOUR TROUBLE, WE DO APPRECIATE IT