EMAIL TEMPLATE: BOOKKEEPERS AND TAX AGENTS

KEY DATE REMINDER\_ANNUAL RETURN

# PURPOSE

An email template to remind your client to confirm any changes to their incorporated company prior to submission of an annual return to companies office.

This template applies if **you file the annual return on behalf of your client**.

# EMAIL FEATURES

In this email you:

* Ask your client to confirm any changes to directors or addresses for their registered company
* Remind your client to provide you with any updated information so you can file their annual return

# EMAIL TEMPLATE

Use the template below as a starting point.

Select the options that suit your business. Select the options that suit your business. These options are in yellow highlighted text. Prompts to consider are included in red guidance text.

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| Subject Line: **Your Business Name | Key Reminders | Annual Returns** **Example: ABC Bookkeeping | Key Reminders | Annual Returns**Hi [client name],As a registered company, you are required to submit an annual return to companies office each year. The purpose of this is to maintain your company on the public register. This is **mandatory** and cannot be missed each year. Your next **annual return** must be filed by **insert date**. Some key reminders. Let us know if any of the following have changed:1. **Have any directors changed?** If so, you will need to ensure you have registered the changes with companies office before we file your annual return.
2. **Have the shareholdings changed?** If so, you will need to update the details with companies office before we file your annual return.
3. **Has your address changed?** Let us know if you have changed the registered address of your company or the postal address.

**Filing Fee** Our fee for filing your annual return is $XX. Please note this includes the standard companies office fee and will be added to your next invoice. **Queries** If you have any queries, please email us or call. If you require an appointment for a more detailed query, please use this link to book a time to suit you. \*\*Use if you use scheduling tool such as Calendly, acuity etc.\*\* xMany thanks for working with us. [Your name][Email][Contact Number][Logo] |
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