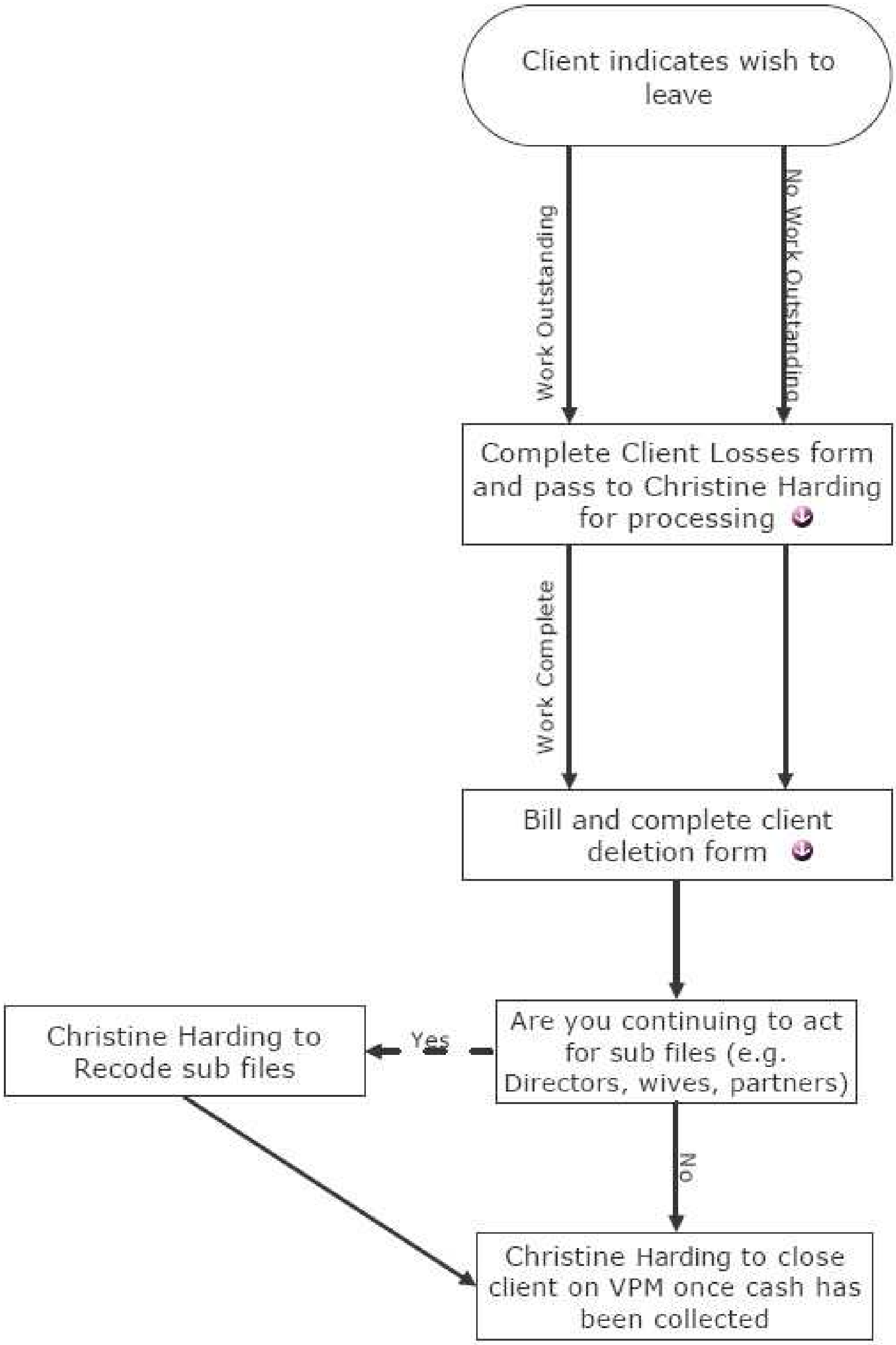
Ryecroft Glenton
Chartered Accountants

Client Losses



INSTRUCTIONS TO FOLLOW WHEN CLIENTS ARE LOST

When a client is lost, the partner must fill in a CLIENT LOSSES FORM. This form must still be completed if there is no work to complete for the client and it is to be deleted straight away.

The form asks for the following information:-

Client code and name

- Reason for the loss
- New agent
- Length of time we have acted
- Any other information

Please fill in as much information as possible.

Once complete this form should be passed to Christine Harding who will make the necessary changes in VPM.

The client status will be changed to LOST BUT COMPLETING WORK and the form will be filed away.

Any information entered onto this form will appear on the monthly client gains and losses reports that go into the partners packs.

A separate form should be filled in for each sub file.

INSTRUCTIONS TO FOLLOW WHEN CLIENTS ARE DELETED

When all work has been completed for a client and all time either billed or written off, a CLIENT DELETION FORM must be filled in and signed by the partner. This should then be passed to Christine Harding for processing.

Any time left on the job will automatically be written off if the form is signed.

A separate form should be filled in for each sub file.