

Practice & Office Details:

Practice Name:	
Phone number:	
Fax number:	
Web site:	
Email address (generic):	
Main office: Wheelchair Access: Y/N	
Legal Aid: Y/N	
Fixed Fee Interview: Y/N	
Authorised Trainer: Y/N	
Office Opening Time:	
Office Closing Time:	
Lunch Start Time:	
Lunch Finish Time:	
Payment Day:	
SRA Number:	
ABS Licence No:	
Main Office Address:	
Registered Office (if Company and different to main office address):	
DX Address:	

PAUL WILKINSON CONSULTING

Number of offices:		
Number of regulated principals in this practice:		
Number of solicitors and lawyers in this practice:		
OPM Annual Audit Date:		
Library Subscriptions and Periodicals:		
Areas of work:	Work type (Where applicable)	Insert Y
	Arbitration and dispute resolution	
	Bankruptcy/Insolvency	
	Children	
	Commercial/corporate work for non-public companies	
	Commercial/corporate work for public companies	
	Consumer	
	Debt collection	
	Discrimination/Civil liberties/Human Rights	
	Employment	
	Family/Matrimonial	
	Financial advice and services (regulated by FCA)	
	Financial advice and services (regulated by SRA)	
	Immigration	
	Intellectual Property	
	Landlord and Tenant	
Litigation – other		
Mental Health		
Non-litigation – other		

PAUL WILKINSON CONSULTING

	Personal Injury	
	Planning	
	Probate and Estate administration	
	Property – commercial	
	Property – residential	
	Social Welfare	
	Wills, Trusts and Tax planning	
	Other (please give details)	
Languages spoken in office:		

Money and Accounting:

Is your Accounts Department Outsourced or In-House:	
Cash Acceptance Limit:	

Legal Status:

Legal Status:	Sole Practitioner Partnership LLP Limited Company ABS LDP
Class of people responsible for the overall running of the practice:	Principal Partner Equity Partner Director Member

PAUL WILKINSON CONSULTING

If Company, Company Number:	
If Company, date of annual return to Companies House:	
If ABS, ABS License Number:	
Date of Annual Return to SRA:	

Accreditation Quality Standards:

CQS Accreditation:	
CQS Accreditation Number:	
CQS Accreditation Date:	
CQS Renewal Date:	
WIQS Accreditation:	
WIQS Accreditation Number:	
WIQS Accreditation Date:	
WIQS Renewal Date:	
Lexcel Accreditation:	
Lexcel Accreditation Number:	
Lexcel Accreditation Date:	
Lexcel Annual Maintenance Visit Date:	
LAA SQM Accreditation:	
LAA SQM Accreditation Number:	
LAA SQM Accreditation Date:	
LAA SQM Audit Date:	
ISO 9001 Accreditation:	
ISO 9001 Accreditation Number:	
ISO 9001 Accreditation Date:	
ISO 9001 Annual Maintenance Visit Date:	

PAUL WILKINSON CONSULTING

IIP Accreditation:	
IIP Accreditation Number:	
IIP Accreditation Date:	
IIP Maintenance Visit:	
IIP Status : Gold / Silver / Bronze	
ICO Data Protection Register:	
ICO Registration Number:	
ICO Registration Date:	
ICO Registration Expiry Date:	

Key Personnel:

The position/positions of the main person/persons responsible for the Management of the firm: (e.g. Senior Partners, Managing Partner)	
COLP: Deputy :	
COFA: Deputy :	

Money Laundering Reporting Officer MLRO: Deputy MLRO:	
Senior Responsible Officer (CQS):	
Compliance Manager:	
First Aid Supervisor:	
First Aiders:	

PAUL WILKINSON CONSULTING

Professional Indemnity Insurance Limit: £	
Professional Indemnity Insurer:	
Professional Indemnity Insurance Policy Number:	
Date Professional Indemnity Insurance starts from:	
Date Professional Indemnity Insurance runs to:	
Employer Liability Insurance Limit: £	
Employer Indemnity Insurer:	
Employer Liability Insurance Policy Number:	
Date Employer Liability Insurance starts from:	
Date Employer Liability Insurance runs to:	
Office Liability Insurance Limit: £	
Office Liability Insurer:	
Office Liability Insurance Policy Number:	
Date Office Liability Insurance starts from:	
Date Office Liability Insurance runs to:	
Insurance Broker: name:	Firm
	Contact name:
Broker Contact Telephone Number:	