

Credit Account Application Form



REQUEST FOR A CREDIT ACCOUNT ON IOSH SERVICES LTD

Please note that we reserve the right to refuse an application. We are unable to approve credit accounts for sole traders, partnerships with fewer than 4 partners and unincorporated associations.

When your application has reviewed and a credit check has been completed, you will be notified of the outcome, and if successful asked to sign revised payment terms prior to the credit account being opened.

The form can be completed in pdf with "fill & sign"

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|--|--------------------------|-------------------------------------|-------------------------------------|--|-----|----------------------------------|----------------------|
| Customer Name: | | | | Customer Account Reference (this can be found on your invoice or statement): | | | |
| Address: | | | | | | | |
| Town: | | | | County: | | | |
| Postcode: | | | | Country: | | | |
| Telephone: | | | | | | | |
| Email: | | | | | | | |
| Company number: | | | | VAT number: | | | |
| Is the business a? | Sole Trader / Individual | Partnership with 4 partners or less | Partnership with 5 partners or more | Unincorporated Association | LLP | Incorporated body i.e. PLC / Ltd | Public Body i.e. NHS |
| | | | | | | | |
| Amount of Credit requested | | | | | | £ | |
| Latest financial statements attached | | | | | | Yes / No | |
| Agreement to credit check being undertaken (delete as appropriate) | | | | | | Yes / No | |
| Signed: | | | | Date: | | | |
| Printed Name: | | | | | | | |
| Title of Role: | | | | | | | |

Please return your completed form to your IOSH contact or finance@iosh.com

Thank you for taking the time to complete this form.

Internal use Only

| | | | |
|---|----------|------------------|----------|
| Checked by: | | Date: | |
| Terms & Conditions signed form received | Yes / No | Date: | |
| Credit Check undertaken: | Yes / No | Date: | |
| Credit Check result: | | Credit Approved: | Yes / No |
| Customer Average payment days | | | |
| Amount of Credit Approved: | £ | | |
| Reviewed & Agreed by Head of Financial Services | Yes / No | Date: | |
| Reviewed & Agreed by Director of Finance & Governance (Non-Standard T&C's) | Yes / No | Date: | |

Version control

| V | Last amended | Author | Reason for amendment | Review date |
|---|--------------|----------|-------------------------|--------------|
| 1 | 19/12/2019 | K Cowell | Converted to new format | January 2021 |
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| Form Owner | |
|----------------------------|--|
| Head of Financial Services | |

| Related operational policies/business rules/process | Reference |
|---|-----------|
| Credit Terms Business Rule | FINBR0001 |
| Process – Credit Account | FINPRO003 |
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