BUSINESS CASE WHITEPAPER · FND-010

Corporate shareholder intake

Show who a corporate shareholder is and who can act for it.



The decision

The corporate shareholder's trading name, legal identity and signatory authority are spread across records.

What the fee buys

We index the ownership and authority records for one corporate shareholder for agent review.

When to commission

Commission when the appointed agent needs a coherent record for one corporate shareholder.

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SCOPE AND OPERATING CASE

How the work changes the decision

Starting position

A parent company uses a trading style on correspondence and a different registered name.

In this illustrative case

Index the entity under its registered identity and link the record showing who can act for it.

Inputs and ownership

Identify the shareholder entity, record dates and the person authorised to act for it.

1. Confirm the shareholder entity
2. Index ownership and authority records
3. Flag questions for the agent

Using the handover

Use the index to show the agent which records establish ownership and which establish signing authority.

An alternative to buying

Use an existing group-secretarial index if it is current and complete.

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INVESTMENT AND EVALUATION

Test the case before approving spend

£399 GBP · one-time catalogue fee excluding applicable VAT

Full cost to the buyer

Government, agent, address and bank charges are separate where applicable. Include the cost of preparing inputs, reviewing the output and implementing any subsequent changes.

A time-only comparison

At an illustrative £40 per staff hour, the fee alone equals 9.97 hours. Replace £40 with your own fully loaded hourly cost. Divide the full incremental cost by that rate to find your break-even hours. Count only effort you can reasonably avoid. This illustration predicts no saving.

What to measure

Check whether every authority claim links to an entity, dated record and responsible contact. Record a baseline before work begins. Use the same scope and definition at follow-up, and note changes outside this service.

Timing and dependencies

Pay upfront at the external checkout. You can prepare immediately. We track clearance and start intake when payment clears, which can take up to seven business days depending on the payment system. The estimate after start and receipt of complete inputs is 3–7 working days for our work. Provider and applicant waiting time is additional.

Approval test

Commission when the appointed agent needs a coherent record for one corporate shareholder. Assign an owner for the handover and a date for checking the measure. If the inputs or owner are missing, defer the purchase.

Basis: Routine Works service specification FND-010, GBP catalogue fee and an illustrative working case. View service scope.

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