

## Change of Legal Entity Request – Manual form

### Summary of UKAS Policy on the Change of Legal Entity & Transfer of Accreditation

1. Notification of the intent to transfer accreditation from one legal entity to another must be provided to UKAS before any changes to the legal entity take place to avoid accreditation being suspended or withdrawn. The notification and request for transfer of accreditation shall be formally submitted to UKAS via this questionnaire. Upon receipt, UKAS will undertake a review to determine how the change in legal entity may impact on the maintenance of accreditation and whether accreditation can be transferred.
2. Where the change in legal entity does not impact on the accredited service provided (e.g. where the management, resources, management system and procedures remain unchanged) then transfer of accreditation may be relatively straightforward. However, if it is evident from the information provided that the accredited service could or will be affected by the change then UKAS shall determine whether any additional assessment effort will be required to determine conformity with the requirements for accreditation.
3. If the change in legal entity also requires additional activities to be added to your accredited scope, then this will be dealt with separately and will require the submission of an extension to scope application covering those additional activities your organisation wishes to add.
4. Work undertaken by the new legal entity cannot be reported as accredited until the transfer of accreditation process is complete, and accreditation is granted. UKAS will require information to be provided to support the transfer of accreditation. If this information is not supplied this will result in a delay in processing the transfer.
5. For accreditation to be transferred, the receiving legal entity must be willing and able to assume all contractual, legal, financial, and other obligations associated with the accredited activities of the current accredited entity, as outlined in the Declaration. This includes responsibilities toward UKAS, accreditation scheme owners, competent authorities, and clients currently served by the accredited entity. Where such a transfer of obligations is not feasible, the accreditation cannot be transferred. In such cases, the new legal entity must submit a fresh application for accreditation in accordance with the procedures detailed on the UKAS website ([www.ukas.com](http://www.ukas.com)) under '[Accreditation/How to Apply for Accreditation](#)'
6. An application to transfer accreditation to a new legal entity is not guaranteed and UKAS reserves the right to reject an application and suspend or withdraw accreditation should it come to light that information declared to us is false and/or is found to not meet the requirements of accreditation.
7. The person completing this questionnaire shall be an authorised senior representative (e.g. a Director or Secretary as listed on Companies House, or the Sole Trader in the case of a sole proprietorship) of the accredited organisation seeking the transfer of its UKAS accreditation to a new legal entity.
8. UKAS requires evidence confirming that the individual completing this notification including the declaration at the end of the questionnaire is authorised to act on behalf of the company.
9. UKAS will apply a minimum charge equivalent to 0.5 days of assessment effort to cover the administrative costs associated with transferring accreditation to a new legal entity. Where additional assessment is required to fully evaluate the transfer request, further charges will apply. A quotation for any such additional effort will be provided in advance, and fees will be invoiced in accordance with our Standard Terms of Business.

**All invoices for the change will be sent to the existing accredited legal entity**

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10. Any changes identified will be reviewed by UKAS to determine the impact these changes will have on the accredited activities to be transferred to the new legal entity. This may result in additional assessment, by document review, remote, site or a combination of these.

Your application to transfer your accredited activities to the proposed new legal entity cannot proceed until the changes have been assessed and deemed to meet the requirements of accreditation.

**I confirm that I have read and understood the UKAS Policy as detailed above**

**Part 1: Contact Information**

1. Who will be the main contact person for this change of legal entity?

Full Name	
Position	
Telephone	
Email	

2. Who will be the authorised representative signing the UKAS Customer Agreement for the new legal entity?

**Note:** the person signing the new UKAS Customer Agreement on behalf of the company/organisation shall be of director level (or equivalent). This authorised representative will be sent an electronic copy of the Customer Agreement for signing digitally. The change of legal entity and transfer of accreditation to the new legal entity cannot be completed until UKAS has assessed the change of legal entity, received all required information and received an appropriately signed UKAS Customer Agreement.

Full Name	
Position	
Telephone	
Email	

3. Please confirm you understand the UKAS Agreement will be sent to the main contact named in Q1 (if different) who will need send this on to the person named in Q2.

Yes -

**Part 2: Company information for the existing accredited legal entity**

4. What is the full name of the existing accredited legal entity?

5. What is the full registered address of the existing accredited legal entity?

6. What is the UKAS accreditation number(s) for the existing accredited legal entity?

7. What is the company registration number (if applicable) for the existing accreditation legal entity?

**Part 3: Reason for the change of legal entity**

8. What is the reason for the change of legal entity?

<i>Merger /Acquisition</i>	<input type="checkbox"/>
<i>Rebranding</i>	<input type="checkbox"/>
<i>In administration/liquidation</i>	<input type="checkbox"/>
<i>Restructuring</i>	<input type="checkbox"/>
<i>Other (please specify)</i>	

9. What is the deadline you are working to for this change of legal entity? Click or tap to enter a date.

**Part 4: About the proposed new legal entity**

10. What is the full name of the new legal entity as proposed to Companies House or equivalent?

11. What is the full registered address of the proposed new legal entity?

12. Do you have a company registration number for the new legal entity?

Yes -  – please provide the number

No -  – please provide details of when it is expected to be available and when it will be supplied to UKAS noting that the new company registration number must be provided before the change of legal entity and transfer of accreditation can be completed.

13. What is the invoicing contact name for the new legal entity?

14. What is the billing address for the new legal entity?

15. What is the invoicing email address for the new legal entity?

16. What is the legal status of the new legal entity please select from the list below:

<input type="checkbox"/>	Limited Company (Ltd)	<input type="checkbox"/>	Partnership
<input type="checkbox"/>	Limited Liability Partnership (LLP)	<input type="checkbox"/>	Academic institution
<input type="checkbox"/>	Charity	<input type="checkbox"/>	Public limited company (plc)
<input type="checkbox"/>	Sole trader	<input type="checkbox"/>	Other: <a href="#">Click here to enter text.</a>
<input type="checkbox"/>	Joint venture	<input type="checkbox"/>	Public Body

17. Are any of your existing locations covered within the scope of the current legal entity transferring to the new legal entity? YES  NO

Please provide details of the sites that are transferring: (Please use additional sheet if required)

Site address	Company Name	Activities performed

18. Is the new legal entity part of a group or corporation?

No -  – go to next section

Yes -  – Please give the full name and address of the group or corporation which the new legal entity is part of.

19. Does the new legal entity have a relationship with any other parties?

No -  – go to Part 5

Yes -  – In the table below please detail any party which the new legal entity has a relationship with, and key activities undertaken?

Note: such a relationship could be based on ownership, governance, management, personnel, shared resources, finances, contracts, marketing (including branding)

Related Body Name & Address	Nature of relationship	Key activities undertaken which may pose a risk/threat to impartiality

20. Where you have indicated that a risk/threat may exist please attach evidence of how this has been minimised or eliminated. Has evidence been attached with the application?

YES  NO

Note: if a risk to impartiality is identified, it will be necessary to demonstrate to an acceptable level (as part of the assessment of this change of legal entity) how these have been minimised or eliminated.

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**Part 5: Approved bodies**

21. Is the current accredited legal entity an Approved body for product regulations

No -  – go to Part 6

Yes –

Please complete the table below for each of the product regulations covered by your current scope of UKAS accreditation – *(Please use additional sheet if required)*

<u>Regulation</u>	<u>Competent Authority</u>	<u>Date Competent Authority Notified of proposed change of legal entity.</u>

**Part 6: Schemes recognised for the purpose of accreditation**

22. Is the current accredited legal entity accredited in accordance with any scheme(s) as defined in your schedule of accreditation and which have been recognised for the purpose of accreditation?

No –  - go to Part 7

Yes –

23. Do you have a licence agreement with Scheme owners which require the Scheme owner(s) to be notified of any significant changes?

No –  Go to Part 7.

Yes -  Please complete the table below for those externally recognised Scheme(s) where the licence agreement requires notice of planned changes to the legal entity.

<u>Scheme</u>	<u>Scheme Owner</u>	<u>Date Scheme Owner notified of proposed change of legal entity.</u>

**Part 7: Information on Proposed Changes**

24. Are there any planned changes to key positions (including deputies) within the management due to the change in legal entity e.g. Technical Manager, Quality Manager, qualified staff required by accreditation?

No –  - go to next question

Yes –  - please provide details of the changes to key positions including when these are planned to take effect.

25. Will there be any impact on the current workforce e.g. loss of authorised staff, recruitment of new staff, transfer of staff between sites brought about by the change in legal entity?

No –  - go to next question

Yes –  - please provide details of the changes to the workforce including when these are planned to take effect.

26. Are there any expected changes to those premises undertaking accredited activities because of this proposed change of legal entity e.g. changes to laboratories, workshops, areas for sample receipt /storage/disposal, record storage?

No –  - go to next question.

Yes –  - please provide details of the changes to the premises including when these are planned to take effect.

27. Are there any expected changes to key equipment because of the change in legal entity, e.g. loss, new purchases, re-commissioning if relocated, changes to maintenance and/or calibration contracts?

No –  - go to next question

Yes –  - please provide details of the changes including when these are planned to take effect.

28. Will this change in legal entity result in changes to the management system that underpins the existing accredited scope:

No –  - go to next question

Yes –  - please provide details of the changes including when these are planned to take effect.

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**Part 8: Supporting information**

***The following information is required to support the process for transfer of accreditation to the new legal entity. If the information stated below is not currently available this does not prevent the submission of this notification/application. However, UKAS will not be able to finalise and grant your transfer of accreditation to the new legal entity until all required evidence to support transfer have been provided and assessed.***

Evidence the new legal entity will accept **ALL** liabilities resulting from the accredited activities of the existing accredited legal entity.

This evidence is attached. YES  NO

Certificate of incorporation or Articles of Association (if appropriate) or equivalent evidence to confirm the legal status of the new legal entity

This evidence is attached. YES  NO

Evidence demonstrating suitable insurance/liability cover for the new legal entity is in place and which is sufficient to cover all the accredited activities seeking to be transferred.

This evidence is attached. YES  NO

Evidence that the person completing this questionnaire is authorised to do so on behalf of the UKAS accredited organisation seeking to transfer accreditation to a new legal entity e.g. a letter of authorisation on company letterhead from a company director or secretary

This evidence is attached. YES  NO

If any of the supporting information requested is not yet available, please indicate below why, and when you expect to be able to provide this.

**Note:** Where information needed to conclude this transfer is not currently available and/or UKAS requires further assurances in relation to the acceptance of legal and financial liabilities we reserve the right to withhold transfer of accreditation until such information has been provided, reviewed and deemed suitable prior to completing the Transfer of Accreditation to the new Entity.

**Part 9: Declaration****PLEASE READ THE FOLLOWING DECLARATIONS CAREFULLY.**

In making this declaration I confirm that:

**(1)** The entity seeking accreditation is not involved in any civil, criminal, or arbitration proceedings or mediation or in any proceedings before any tribunal, and no such proceedings are threatened or pending.

I declare that I am authorised, on behalf of the company / organisation, to confirm the above.

**(2)** The entity seeking accreditation is not subject to any current, threatened or pending investigation, inquiry or enforcement proceedings by any governmental, administrative, regulatory or official body.

I declare that I am authorised, on behalf of the company / organisation, to confirm the above.

**(3)** No entity which is accredited by UKAS and is connected to the entity seeking accreditation is involved in any civil, criminal, or arbitration proceedings or mediation or in any proceedings before any tribunal, and no such proceedings are threatened or pending.

I declare that I am authorised, on behalf of the company / organisation, to confirm the above.

**(4)** No entity which is accredited by UKAS and is connected to the entity seeking accreditation is subject to any current, threatened or pending investigation, inquiry or enforcement proceedings by any governmental, administrative, regulatory or official body.

**Note:** For the purposes of this declaration, "connected" shall mean that the entity seeking accreditation and the entity already accredited by UKAS are group companies or share directors, or that one is the successor, assignee or representative of the other.

I declare that I am authorised, on behalf of the company / organisation, to confirm the above.

**(5)** The applicant is not aware of any information that may be relevant to UKAS's assessment of the Application which has not already been disclosed to UKAS by the entity seeking accreditation.

I declare that I am authorised, on behalf of the company / organisation, to confirm the above.

I declare that I am authorised, on behalf of the UKAS accredited body seeking to transfer its legal entity to submit this questionnaire and the information contained herein is both correct and accurate to the best of my knowledge.

Name:

Position:

Date: Click or tap to enter a date.

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