

NEW CLIENT FORM

Please complete all items in the required field(s), save to your local drive and email the document(s) and any attachment(s) to our office.

Client Name: _____

TYPE OF ENTITY

Individual

Company

Trust

Super Fund

Partnership

Estate

Date of Birth (if applicable): _____ Tax File Number: _____

Registered for GST: Yes No ABN (if applicable): _____

BAS Required Yes No

IAS Required Yes No

ADDRESS DETAILS

POSTAL ADDRESS

Address: _____
_____ Postcode _____

BUSINESS ADDRESS

Address: _____
_____ Postcode _____

HOME ADDRESS

Address: _____
_____ Postcode _____

CONTACT DETAILS

Mobile No: _____ Home No: _____

Home Fax : _____

Business No: _____ Business Fax: _____

Email: _____

NEW CLIENT FORM CONTINUED

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ASSOCIATES

Spouse: _____
 Company(s): _____
 Trust(s): _____
 Partnership: _____
 Super Fund: _____

Ethical Letter Required:	Yes	No	Old accountant details:
Add to Tax Agent Portal:	Yes	No	
Add to ASIC Registered Agency:	Yes	No	

POTENTIAL TAX REFUND DETAILS

EFT DETAILS

Account Name: _____ BSB: _____
 Account No: _____

DEPENDENT CHILDREN

Name of child _____ Child DOB _____ Name of child _____ Child DOB _____
 Name of child _____ Child DOB _____ Name of child _____ Child DOB _____

INFORMATION REQUEST

FINANCE

Do you have a current home, business, investment or equipment loan? If so, please provide us with latest statement showing closing balance and applicable interest rate. We will use this to review your current lending arrangements, before connecting you with our trusted network of financiers to potentially provide you with some real dollar saving alternatives. Yes No

INSURANCE

Do you have current Income Protection, Life & Total & Permanent Disablement (TPD), Trauma/Critical Illness and/or General Business insurance policies? If so, please provide us with relevant policy statement(s). We will use these documents to review your current insurance position before connecting you with our trusted network of insurance providers to ensure you have the right policies in place. Yes No

SUPERANNUATION

Do you have a current balance of monies in an industry or retail Superannuation Fund? If so, please provide us with latest statement(s) showing closing balance. We will use these documents to help you explore the alternative of running your own Self Managed Super Fund, in which you can have greater control and access to alternative investment options not otherwise available (including the potential to borrow to buy property). Yes No