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**Client Intake Form**

DATE: \_\_\_\_\_\_ / \_\_\_\_\_\_ / 20 \_\_\_\_\_ CLIENT CODE: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

|  |  |
| --- | --- |
| **FIRST NAME:** |  |
| **LAST NAME:** | ­­­­­­­ |
| **KNOWN AS:** |  |
| **TAX FILE No:** |  |
| **D.O.B.** |  |
| **OCCUPATION:** |  |
| **BANK ACC DETAILS** |  |
| **BSB** |  |
| **ACCT NUMBER** |  |
|  |  |

|  |  |
| --- | --- |
| **RESIDENTIAL ADDRESS:** |  |
| **POSTAL ADDRESS:** |  |
| **EMAIL ADDRESS:** |  |

**CONTACT DETAILS**

|  |  |  |  |
| --- | --- | --- | --- |
| HOME: |  | BUSINESS: |  |
| MOBILE: |  |  |  |
| **FAMILY DETAILS** |  |
| CHILDREN | D.O.B. |
|  |  |
|  |  |
|  |  |
|  |
| **TYPE OF BUSINESS** |  |
|  SOLE TRADER  |  SALARY WAGE INCOME | GST: YES NO |
|  PARTNERSHIP |  QUARTERLY MONTHLY  |  |
| **ABN:**\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ |  **TRADING NAME:**\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ |
| **HOW DID YOU FIND OUT ABOUT US** |
|  GOOGLE |  REFERRAL: NAME |
|  FACEBOOK |  OTHER: PLEASE SPECIFY |
|  FLYER |