



New Client Form

General	
First Name	
Last Name	
Other Names	
Date of Birth	
Gender	Male <input type="checkbox"/> Female <input type="checkbox"/> Not specified <input type="checkbox"/>
Title	Mr <input type="checkbox"/> Mrs <input type="checkbox"/> Miss <input type="checkbox"/> Ms <input type="checkbox"/> Dr <input type="checkbox"/>
Contact	
Phone	
Business Email Address	
Business Address	
Postal Address	
Residential Address <i>(If different to postal)</i>	
Account Terms	
Account Payment	7 days <input type="checkbox"/> 14 days <input type="checkbox"/> EOM <input type="checkbox"/> Other <input type="checkbox"/>
Accounts Email:	
Accounts Contact:	
Business Details	
Australian Business Number (ABN)	
Registered Business Name	
Payroll Details	
Tax File Number	
Super Details (inc fund and Member #)	
Bank Details	BSB: Account: Bank: Name:

Business Information		
GST Registered?	<input type="checkbox"/> Yes <input type="checkbox"/> No	
PAYG Registered?	<input type="checkbox"/> Yes <input type="checkbox"/> No	
Director's ID	<input type="checkbox"/> Yes <input type="checkbox"/> No	
Accounting Software Used	<input type="checkbox"/> Xero <input type="checkbox"/> MYOB <input type="checkbox"/> Other: _____	
Business Bank Account Setup	<input type="checkbox"/> Yes <input type="checkbox"/> No	
Customer Requirements		
Bookkeeping access to Xero	<input type="checkbox"/>	
Xero Subscription Choice	<input type="checkbox"/> Payroll only <input type="checkbox"/> Starter <input type="checkbox"/> Standard <input type="checkbox"/> Premium <input type="checkbox"/> Ultimate 10	* Note: Subscriptions to be paid by the customer directly and are not included in weekly fees
Xero Setup Required	Yes <input type="checkbox"/> No <input type="checkbox"/>	
Payroll	<input type="checkbox"/> Weekly <input type="checkbox"/> Fortnightly <input type="checkbox"/> Monthly	Day of the week: Date of the month: Amount: _____ + Super
Bank Reconciliation	<input type="checkbox"/> Hubdoc <input type="checkbox"/> Bank Access <input type="checkbox"/> Bank transfers	# Bank accounts:
Accounts Payable/Receivable	<input type="checkbox"/> Invoices <input type="checkbox"/> Monthly Statements <input type="checkbox"/> Entry of accounts paid <input type="checkbox"/> Entry of accounts received <input type="checkbox"/> Purchase Orders <input type="checkbox"/> Quotes	