



# MASTERFUL PARTNERS

Accounting - Taxation - Advisory

## New Client Details:

MR/MR/MS/MISS	FIRST NAME	LAST NAME
<input type="text"/>	<input type="text"/>	<input type="text"/>
DATE OF BIRTH (DD/MM/YYYY)		MOBILE PHONE
<input type="text"/>	<input type="text"/>	<input type="text"/>
ADDRESS		STATE
<input type="text"/>		<input type="text"/>
		POSTCODE
<input type="text"/>		<input type="text"/>
TAX FILE NUMBER	EMAIL ADDRESS	
<input type="text"/>	<input type="text"/>	
ACCOUNT NAME	BSB	ACCOUNT NUMBER
<input type="text"/>	<input type="text"/>	<input type="text"/>
OCCUPATION	DO YOU HAVE AN INVESTMENT PROPERTY?	
<input type="text"/>	<input type="checkbox"/> YES <input type="checkbox"/> NO	

## Spouse Details (if applicable):

MR/MR/MS/MISS	FIRST NAME	LAST NAME
<input type="text"/>	<input type="text"/>	<input type="text"/>
DATE OF BIRTH (DD/MM/YYYY)		DID YOU HAVE SPOUSE FOR THE FULL YEAR? IF NOT, FROM WHEN?
<input type="text"/>	<input type="text"/>	<input type="checkbox"/> YES <input type="checkbox"/> NO ____ / ____ / ____

Please email completed form to [info@masterfulpartners.com.au](mailto:info@masterfulpartners.com.au)

## Consent to Act – Individual

### Registered Tax Agent / Accountant

I/We hereby consent to the appointment of Masterful Partners Pty Ltd – TAN 26120403 to act as the Registered Tax Agent and Accountant on behalf of:

**Name:** \_\_\_\_\_

**Tax File Number:** \_\_\_\_\_

**ABN:** \_\_\_\_\_

### Acknowledgement and acceptance of the Term of Engagement

I/we further consent to the appointment of Masterful Partners as the Tax Agent for. I/we accept that appointing your firm as our Tax Agent provides you with authority to prepare and lodge Australian Taxation Office documents and forms on our behalf, where appropriate and at your discretion. The documents and forms may relate to tax agent administration, income tax, Goods and Services Tax (GST), Pay As You Go (PAYG) and activity statement matters.

### Furthermore, I/we authorise Masterful Partners Pty Ltd to;

1. Obtain information from our previous accountant and the Australian Taxation Office.
2. Pass on taxation & financial information to banking/financial institutions at our request
3. Add our details to the Masterful Partners Pty Ltd mailing list to receive e-news and other electronic and paper-based correspondence.

**Name:** \_\_\_\_\_

**Signature:** \_\_\_\_\_

**Date:** \_\_\_\_\_