|  |  |  |
| --- | --- | --- |
|  | **Client 1 details** | **Client 2 details** |
| **Full Name** |  |  |
| **Date of Birth (DOB)** |  |  |
| **Occupation** |  |  |
| **Home Address** |  |  |
| **Postal Address (if applicable)** |  |  |
| **Email Address** |  |  |
| **Mobile Number** |  |  |
| **Preferred contact method** | email  SMS  mobile  bus. hrs  after hrs  anytime | email  SMS  mobile  bus. hrs  after hrs  anytime |
| **Dependant children’s names**  **and dates of birth.** |  |  |
| **Do you own a rental property?** | Yes  No | Yes  No |
| **Do you own any shares?** | Yes  No | Yes  No |
| **Do you own any Managed Funds?** | Yes  No | Yes  No |
| **Do you own cryptocurrency?** | Yes  No | Yes  No |
| **Previous Accountants details**  **Firm name & business address**  **email address (if known)** |  |  |
| **How did you hear about us?** |  |  |
| **If a refund is due, the ATO**  **deposits this directly into your**  **bank account.**  **Please provide us with a bank**  **account for our records.** | BSB:  Acc No:  Bank Name:  Acc Name: | BSB:  Acc No:  Bank Name:  Acc Name: |
| **Proof of Identity** | As a new client, the Tax Practitioners’ Board require that you undergo a client identity verification  check, even if your previous accountanthas done so. Like many Australian accounting practices,  we use Annature; an encrypted secure Australian-based company or all our client identity  verification checks. Annauture also allow us to securely collect your Tax File Number (TFN) and  your bank account details during the identity verification process. | |