

NEW CLIENT INFORMATION

Your Details (Individual Taxpayers only)

Title:

Mobile Number:

Email Address:

Residential Address:

Postal Address:

Do you have any dependent children:

Ages of dependent children:

Do you own a rental property?

Do you own any shares or Managed Funds (ETF's):

Do you own cryptocurrency:

Previous Accountants name:

Previous Accountants address:

How did you find us?

IDENTITY VERIFICATION, TAX FILE NUMBER AND BANK DETAILS

As a new client, the Tax Practitioners' Board requires that you undergo a client identity verification check even if your previous accountant has done so.

Like many Australian accounting practices, we use Annature, an encrypted, secure Australian-based company, for our client identity verifications.

Annature also allows us to securely collect your tax file number, date of birth and bank account details during an identity verification request.

You will receive an email shortly with a link to a client identity verification check.

ENGAGEMENT LETTER

To commence services, we require an Engagement Letter to be signed.

You will receive another email shortly with a link to our Standard Terms of Engagement: Tax Agent Services (Non-Business Individual).

Our Engagement Letter can be reviewed and signed electronically also through Annature.

YOUR LAST LODGED TAX RETURN

If you used another tax account last year, please email a copy of your last lodged tax return to us.

THANK YOU

Someone from our office will be in touch with you after we receive the required forms and identity check.