

This form satisfies Know-Your-Business (KYB) identification requirements for entity clients engaging Creative Accounting Services Pty Ltd as their registered Tax Agent.

1. Type of Entity

Company Partnership Trust SMSF

2. Entity / Business Details

Entity Legal Name

Trading Name (if different)

Australian Business Number (ABN)

Australian Company Number (ACN)

Entity Tax File Number (TFN)

Date of Registration

Business Industry Code

GST Registered (Y/N)

Registered / Business Address

Nature of Business / Principal Activity

Contact Person Name

Contact Person Position/Title

Contact Email

Contact Phone Number

3. Beneficial Owners / Directors / Partners / Trustees

List all individuals holding 25%+ ownership, control, directorship or trustee/partner status. Attach additional page if required.

Full Name	Role / Position	Date of Birth	% Ownership	ID Type & Number

4. Authorised Contact – Proof of Identity (KYB)

Please provide photo identification for the individual authorised to act and communicate on behalf of the entity.

Passport

Driver Licence

Photo ID Card

Other

ID / Licence / Passport Number

State / Country of Issue

Expiry Date

Verified by (staff use only):

Staff Name

Verification Method

Date Verified

5. Banking Details

Name on Bank Account

BSB

Account Number

6. Tax Types to be Managed by Agent

Income Tax

GST / BAS

PAYG Withholding

FBT

Superannuation

Payroll Tax

Instalment / IC Activity

Other

If 'Other', please specify

7. Privacy, Consent & Agent Authorisation Declaration

I/we hereby appoint Creative Accounting Services Pty Ltd as my/our registered Tax Agent and authorise them to prepare and lodge returns, activity statements and correspondence with the Australian Taxation Office and other relevant bodies on my/our behalf.

I/we confirm that the information and identification documents provided in this form are true, accurate and complete, and agree to notify Creative Accounting Services Pty Ltd promptly of any changes. I/we consent to the collection, use, storage and verification of this information for client identification (KYC/KYB), AML/CTF and taxation purposes, in accordance with the firm's Privacy Policy.

I/we agree to provide accurate supporting documentation. I/we acknowledge and agree that liability for Creative Accounting Services Pty Ltd's professional fees commences as soon as work on this engagement begins, and that fees are payable prior to lodgement regardless of the outcome of the engagement.

I/we consent to the above declaration and authorise Creative Accounting Services Pty Ltd accordingly.

Full Name of Signatory

Position / Capacity (e.g. Director, Trustee)

Signature

Date

This form and any supporting identification documents will be retained securely by Creative Accounting Services Pty Ltd in accordance with its Privacy Policy and statutory record-keeping obligations.