

# Client Details – Individual Tax Returns



LET'S GET READY FOR TAX TIME!

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## Client Name:

\_\_\_\_\_

First

\_\_\_\_\_

Middle

\_\_\_\_\_

Surname

## Tax File / ABN No:

\_\_\_\_\_

Tax File Number

\_\_\_\_\_

ABN Number (if Applicable)

## Address:

\_\_\_\_\_

Street Address

\_\_\_\_\_

Suburb/Town

\_\_\_\_\_

State

\_\_\_\_\_

Postcode

## Your Other Details

\_\_\_\_\_

Telephone Number

\_\_\_\_\_

Mobile Number

\_\_\_\_\_

Date of Birth

\_\_\_\_\_

Single / Married / De-facto

\_\_\_\_\_

Email address

**Please Note:** We require an email in order to email your ATO Notice of Assessment and "Our Tax Time" reminder letter ONLY – we will NOT send you marketing material

### Bank Details

\_\_\_\_\_

Account Name

\_\_\_\_\_

BSB Number

\_\_\_\_\_

Account Number

The ATO now require bank details for all refunds – refund cheques are no longer issued

## Spouse Details

\_\_\_\_\_

Spouse Name

\_\_\_\_\_

Spouse Date of Birth

\$ \_\_\_\_\_

Spouse Income

## Children / Maintenance

Do you have any dependents

YES / NO

\_\_\_\_\_

If YES, how many

Do you pay any maintenance

YES / NO

\_\_\_\_\_

If YES, how much per month

## Other

Do you have any outstanding issues with the Australian Taxation Office (ATO)?

For example: **Outstanding Tax Returns**

**Bankruptcy, Part 10, or Insolvency (Current or Previous)**

**Or debts**

\_\_\_\_\_

YES / NO

\_\_\_\_\_

If YES, please provide brief details.

Can you provide photo ID (ATO requirement)

\_\_\_\_\_

YES / NO