

Client Details

LET'S GET TO KNOW YOU!

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Client name.....
Address.....
.....
Tax File No..... ABN (if applicable).....
Telephone No..... Mobile.....
Email address.....
Married / Single / Defacto Date of birth.....
Occupation.....

Spouse's details
Spouse Name..... Spouse's date of birth.....
Spouse Income \$.....
Do you have any Dependants?
YES/NO
If yes, how any dependants?
Full Names Date of birth
.....
.....
.....

Do you pay any maintenance?
YES/NO
Amount paid per month \$.....

Was last year's return prepared by a register tax agent?
YES/NO
(If you answered YES, please state the previous tax agent's name and address if known)

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.....

The ATO now require bank details for all refunds
Bank details BSB: Account Number:
Account name:

Do you have any outstanding issues with the Australian Taxation Office (ATO)?
For example:
Outstanding Tax Returns/s
Bankruptcy, Part 10, or Insolvency (Current or previously)
Or debts YES/NO
If YES please provide details
.....
.....

Do you have photo ID with you?
YES/NO
(ATO REQUIREMENT)