

We would appreciate you taking the time to complete the following details. If you have any questions in relation to the form, please do not hesitate to ask for assistance.

Current Details	You	Your Spouse (or Partner)
Names: Surname		
Given Names		
Title: Miss/Ms/Mrs/Mr/Dr		
Date of Birth:		
Occupation (job title):		
Tax File Number:		
Aus Business Number:		
Residential Address:		
Postal Address:		
Business Address:		
Business Name:		
Nature of Business:		
Which Accounting Software are you currently using for your business?	<input type="checkbox"/> Xero <input type="checkbox"/> MYOB <input type="checkbox"/> Reckon <input type="checkbox"/> Quickbooks * We recommend you to use Xero if you do not have one for your business.	
Business Telephone:		
Mobile Phone:		
Home Telephone:		
Email Address:		
Bank Account Details:	BSB:            ACC:	BSB:            ACC:
Children's Names + DOB:		
Authorized person from you to contact us: YES / NO (please circle)		
Name :	Contact Number:	
Postal Address:		
Email Address:		
<b>Any information acquired by Christine Lee or us in the course of our engagement is subject to strict confidentiality requirements. Information will not be disclosed by us to other parties except as required or allowed for by law or professional standards, or with your express consent (verbal or written).</b>		
Please complete and sign the following details so that we may better meet your needs.		
What kind of services would you like to appoint?	<input type="checkbox"/> Tax Return <input type="checkbox"/> BAS <input type="checkbox"/> Bookkeeping <input type="checkbox"/> Registered Office <input type="checkbox"/> Set-up Company/ Trust <input type="checkbox"/> All Tax Compliance <input type="checkbox"/> ASIC agent	
How would you like to receive your tax returns?	<input type="checkbox"/> By Email (via above E-address)    or <input type="checkbox"/> By Printing	
How did you hear about us?	<input type="checkbox"/> Local Paper <input type="checkbox"/> Internet <input type="checkbox"/> Word of mouth by :	
<b>This agreement will be effective immediately between you and Christine Lee mobile tax agent when you fill out your personal details in this form and for future years unless [I/we] advise you of any change in our arrangement.</b>		
Client's Signature/s:	Date:	

Accountant / Tax Agent to complete ( ** to be done at interview)							
Client Code:							
Partner:							
Manager:							
Accountant:							
** Preferred Billing Client:				Client Code:		Linked at: Invoice / Timesheet	
Fee Quoted:							
Any Relationships in client database:							
Tax - Occupation Code:							
** BAS/IAS Returns:				Practice to receive BAS/IAS: Y / N			
				Practice to complete / lodge BAS/IAS : Y / N			
Client Type:  <small>client has a business or generates any business income client has/is a consulting business and would be targeted for PSI issues</small>				Tax <input type="checkbox"/>		Payroll Tax <input type="checkbox"/>	
				Audit <input type="checkbox"/>		Spouse Only <input type="checkbox"/>	
				Commercial <input type="checkbox"/>		Overseas <input type="checkbox"/>	
				Consultant <input type="checkbox"/>			
** Business Turnover:							
** No. of Employees:							
** Accounting Software used:							
** Financial Planning Services:				Interested / Not Interested			
** Client Referred By:							
** Old Accountant:							
Date Client Interviewed:							
Date Form Completed:				By Accountant / Tax Agent:			
Letters:	Required	Initials	Date	Admin:	Required	Initials	Date
Ethical Letter				CU Form Required			
Welcome Letter				Make Up File			
Thank You Referral Letter				Client database updated			
Engagement Letter							
<u>Other Comments:</u>							