New Client Details Form & Engagement Agreement – Company

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	
Company (or Trustee) Name:	(Registration Date:)	ACN: ABN: TFN:
Business Name:		
Registered Office:		
Principal Place of Business:		
Nature of Business:		
Which Accounting Software are you currently using for your business?	☐ Xero ☐ MYOB ☐ Reckon ☐ Quickbooks We recommend you to use Xero for your business.	☐ SimpleFund360 ☐ Sage ☐
Business Telephone & Email:		
Web Site:		
Director/s Names: Surname		
First Names		
Title & Capacity		
Date of Birth:		
Tax File Number:		
Postal Address:		
Residential Address:		
Mobile Phone:		
Home Telephone:		
Email Address:		
What kind of services would you like to appoint?	☐ Tax Return ☐ BAS ☐ Bookkeeping ☐ Registered Office	☐ Set-up Company/ Trust ☐ All Tax Compliance ☐ ASIC agent

Are there any special instructions you would like us to note when contacting you?

This agreement will be effective immediately between company, directors, and Christine Lee Mobile Tax Agent when you sign or fill out this form and for future years unless [I/we] advise you of any change in our arrangement.

Director's Signature/s: ....Date:...................................

Accountant 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:	Tax ☐	Payroll Tax ☐	
	Audit ☐	Spouse Only ☐	
client has a business or generates any business income	Commercial ☐	Overseas ☐	
client has/is a consulting business and would be targeted for PSI issues	Consultant ☐		
** 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:	

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>