

Client profile form

Client name

Business address

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Postal address

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Registered address

(for companies only)

Telephone

Fax

Email

Trade

Contact person

Their position

Spouse

Married during year

Previous name

Partner(s) & staff responsible for this file

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Bank Branch

Solicitors

Insurance brokers Investment brokers

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Other relevant advisors

Company/partnership/trust/individual details

TFN Workcover no

ABN Payroll tax no

Date of birth/incorporation

Work done by other firms of accountants (including "Directors" or proprietors' other interests)

Firm name

Details of work done

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Services register

Details

- Preparation of financial statements
- Tax return prep and lodgement
- Company secretarial
- Management consultants
- Wealth creation
- Risk management
- Computerisation
- Finance
- Succession planning
- Time cost billing
- Annual return required
- FBT provided
- Preparation of BAS
- Preparation of PAYG reconciliation
- Requires ethical letter
- Requires engagement letter
- Requires tax correspondence file
- Requires secretarial register
- Requires stat file
- Other instructions

Attach flowchart of client structure and related entities

- Name of previous accountant
- Address of previous accountant
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- Prepared by (accountant)
 - Date completed
 - Approved by
 - Manager/partner
 - Attachments