



Client information sheet - Entity

Please complete all the questions below. This document is strictly confidential and will be kept only for our own company use.

Legal Name:

Trading Name: *(if applicable)*

Type of Entity: Company Partnership Trust Estate

ABN:

TFN:

ACN:

Date Created: / /

Contact person:

Business Address:

Postal Address: *(If different to above)*

Number of Directors/Partners:

1. Full name:

3. Full name:

2. Full name:

4. Full name:

Home Telephone No:

Mobile No:

Work Telephone No:

Fax No:

Email address:

Describe your company's nature of business:

Registered for GST: Yes No Frequency: Monthly Quarterly Annually

Former Accountant Details: *(if applicable)*

Name of firm:

Contact Name:

Contact no:

Become your ASIC Agents to manage all requirements: *(A fee may occur)* Yes No

Client Portal:

Parramatta Accountants has a cloud-based module through our accounting software provider, Sage HandiSoft. The **Client Portal** has the functionality for clients to securely upload and download their files with the ability to digitally sign off their tax return online, eliminating the delay from postage. Client Portal has a high level of security, with 128 bit encryption and authenticated digital signatures.

Would you like to utilise our client portal services *(Further details will be provided)*: Yes No

Terms and Conditions:

- All our accounts are strictly 14 days from date of invoice or COD where requested
- All work is completed in a professional manner in accordance with the scope of works
- All fees are based on the degree of skill and acumen required to complete tasks
- Client must provide all information and documents to properly perform tasks undertaken
- All work is completed in accordance with legislation and the administration Acts

Applicable to any funds that are deposited into our Trust account:

- You give authority for your tax refund to be cleared through Parramatta Accountants & Tax Agents Pty Ltd trust account
- You give authority for your invoice, accounts and/or disbursement amounts to be deducted from your tax refund
- You agree with having a bank fee charged when refund comes through the trust. Fees are as follows:
 - Under \$10.00: Nil
 - \$10.01 to \$1000.00: \$5.00
 - \$1000.01 to \$5000.00: \$10.00
 - Over \$5000.01: \$15.00

By signing below, you certify all information given in this form is true, complete and accurate and that you agree to the above terms and conditions

Signature of client:

Date: