



## Client information sheet - Individual

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

Client name:

Surname

Given Name

Current Residential Address:

Current Postal Address: *(If different from above)*

Home Telephone No:

Mobile No:

Work Telephone No:

Fax No:

Email address:

Date of Birth:                /                /

Divers Licence No:

Tax File Number:

ABN (if applicable):

Are you registered on MyGov:                Yes                No                Unsure

Do you have a partner: *(If so, please provide full name)*    Yes                No

Do you have any dependents: *(Student under 25, how many?)*    Yes                No

Are you resident of Australia for Tax purposes:    Yes                No                Unsure

What is your occupation: *(Job description)*

Employment Status:

Full-time

Part-time

Casual

Self/employed

Home Duties

Retired/investor

Unemployed

Student

Employer's Name: *(Or trading name if self-employer)*

Employer's Address:

**Name and address of nearest living relative:** *(not living with you)*

Services interested in:

Financial Planning

Insurance Products

Taxation

Self-Managed Super Fund

Other *(give details)*

## 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: