

## CLIENT INFORMATION



\*\*\* Please complete all sections or indicate N/A where applicable \*\*\*

<b>YOUR INFORMATION</b>						
Title:		MR	MRS	MISS	MS	DR
Surname/Family Name:				First Name:		
Date of birth:		Mobile:		Home No.:		Fax No.:
Occupation/Job:				Tax File No.:		
Email :						
Postal Address:						
Residential Address: [if same as postal indicate 'as above']						
Are you a single parent? YES NO			Do your children live with you? YES NO			
Children Name/s:				Approx. Age or Date of birth		
1.						
2.						
3.						
4.						
Any Investment Properties :		YES	NO	Did you use Trezona Accounting last year? YES NO		
Any ABN Income :		YES	NO	If you used another tax agent, how much did you pay? \$		
Any Private Health Cover:		YES	[please provide statement]	NO		
<b>FOR ANY REFUND:</b>						
Bank:		BSB:		Account No.:		
Cheque Cash Cheque???		YES	phone to collect OR post	NO		
		YES	collection only	<b>NB: We do not post 'cash cheques'</b>		
<b>YOUR SPOUSE - Surname:</b>				Spouse first names:		
Title:		MR	MRS	MISS	MS	DR
Spouse date of birth:			Spouse income \$ [approx. if not known]			
Tax File Number:		Mobile:		Home No.:		

I hereby authorise BMT Business Services Pty Ltd to immediately pay my **tax refund cheque**, or my **tax refund direct credit**, received by you on my account in respect to the preparation and lodgement of my income tax return, into a Trust Account operated by you at the Bendigo Bank, Gregory Terrace, Alice Springs.

I further authorise you, in consideration of the preparation and lodgement of my income tax return, to deduct from trust money so held the amount noted below and forward the balance of the account to me at the address shown above, or to my nominee whose name and address I have added to this letter [please refer overleaf], or to direct credit my designated bank account.

I further authorise your professional institution to use any information on such files or records for the sole purpose of its audit and quality reviews as set out in the Quality Control Manual and Members Handbook.

This authority is strictly limited to the preparation and lodgement of the Income Tax Returns enclosed herewith.

**Return Preparation** : Self .....

Fee to deduct from refund \_\_\_\_\_

TOTAL FEE \$ \_\_\_\_\_

**Declaration:**

I declare that

- the information provided to the agent for the preparation of the document is true and correct; and
- the agent is authorised to lodge this tax return

**Important: The tax law imposes heavy penalties for giving false or misleading information.**

Signature of Taxpayer: \_\_\_\_\_

Date: \_\_\_\_\_