

# NEW CLIENT FORM

<b>CLIENT 1</b>	
Title:	Mr, Mrs, Ms, Miss, Dr
Surname:	
First Names:	
Marital Status:	
Occupation:	
DOB:	/ /19
Home Address:	
	Postcode
Postal Address:	
	Postcode
Telephone Home:	( )
Telephone Work:	( )
Fax Number:	( )
Mobile Number:	
Email:	
Tax File No.:	

<b>CLIENT 2</b>	
Title:	Mr, Mrs, Ms, Miss, Dr
Surname:	
First Names:	
Marital Status:	
Occupation:	
DOB:	/ /19
Home Address:	
	Postcode
Postal Address:	
	Postcode
Telephone Home:	( )
Telephone Work:	( )
Fax Number:	( )
Mobile Number:	
Email:	
Tax File No.:	

<b>FAMILY / DEPENDANTS</b>				
	Name	Relationship	Date of Birth	Dependant
1.			/ /	Yes <input type="checkbox"/> No <input type="checkbox"/>
2.			/ /	Yes <input type="checkbox"/> No <input type="checkbox"/>
3.			/ /	Yes <input type="checkbox"/> No <input type="checkbox"/>

<b>OTHER PROFESSIONAL ADVISORS (If known)</b>			
	Firm	Contact Name	Phone
<b>Solicitor</b>			
<b>Financial Advisor</b>			

<b>OFFICE USE ONLY - NEW CLIENTS REFERRED</b>			
<b>CLIENT 1</b>		<b>CLIENT 2</b>	
Date		Date	
_ / _ / _		_ / _ / _	
_ / _ / _		_ / _ / _	
_ / _ / _		_ / _ / _	

<b>LENDING</b>	<b>CLIENT 1</b>	<b>CLIENT 2</b>
Do you have an existing mortgage and amount?	Yes <input type="checkbox"/> \$ _____ No <input type="checkbox"/>	Yes <input type="checkbox"/> \$ _____ No <input type="checkbox"/>
Which 'bank' and the current interest rate?	_____ %	_____ %
Monthly Repayments	Amount \$ _____	Amount \$ _____
Do you have, or are you considering buying an investment property?	Yes <input type="checkbox"/> No <input type="checkbox"/>	Yes <input type="checkbox"/> No <input type="checkbox"/>
Are you looking to refinance any business debt?	Yes <input type="checkbox"/> Amount \$ _____ No <input type="checkbox"/>	Yes <input type="checkbox"/> Amount \$ _____ No <input type="checkbox"/>

<b>ESTATE PLANNING</b>		
Do you have a Current Valid Will?	Yes <input type="checkbox"/> No <input type="checkbox"/>	Yes <input type="checkbox"/> No <input type="checkbox"/>
If yes, when was it last reviewed?	Year: _____	Year: _____
Do you have Life Insurance?	Yes <input type="checkbox"/> No <input type="checkbox"/>	Yes <input type="checkbox"/> No <input type="checkbox"/>
- Through Your Superannuation?	Amount \$ _____	Amount \$ _____
- Non Superannuation	Amount \$ _____	Amount \$ _____

<b>YOUR BUSINESS</b>		
Is your Bookkeeping Computerised? If yes, which Software program do you use and What Version?	Yes <input type="checkbox"/> No <input type="checkbox"/> _____	Yes <input type="checkbox"/> No <input type="checkbox"/> _____
Business Turnover Do you prepare your own BAS? BAS Prepared on What Basis? BAS Lodged how often?	Under \$1M <input type="checkbox"/> or over \$1M <input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> Cash <input type="checkbox"/> or Accruals <input type="checkbox"/> Month <input type="checkbox"/> Quarter <input type="checkbox"/> Year <input type="checkbox"/>	Yes <input type="checkbox"/> No <input type="checkbox"/> Cash <input type="checkbox"/> or Accruals <input type="checkbox"/> Month <input type="checkbox"/> Quarter <input type="checkbox"/> Year <input type="checkbox"/>
Related entities - Company, Trust - Super Fund - Partnership	_____ _____ _____	_____ _____ _____
Do you currently Lease any Cars or Equipment? Are you planning to Finance any Cars or Equipment in the next 12 months?	Yes <input type="checkbox"/> No <input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/>	Yes <input type="checkbox"/> No <input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/>
Do you have Income Protection Insurance?	Yes <input type="checkbox"/> No <input type="checkbox"/> \$ _____ per month or \$ _____ Annually	Yes <input type="checkbox"/> No <input type="checkbox"/> \$ _____ per month or \$ _____ Annually

**OFFICE USE ONLY**

**(CODE: )**

CLIENT NAME: \_\_\_\_\_

Simplified Tax System Election (STS)  Yes  No

BAS  Quarterly  Monthly  Annually

BAS Cash or Accruals

Business Turnover < \$1 Million > \$1 Million

**PRIVATE USE**

	% Claim	Code
Telephone		
Light & Power		
Rates		
Car A		
Car B		
Other		

**RECURRING PAYMENTS – Chattel Mortgage, Lease, Rent & HP Contracts**

\$ Amount	Description/Details	Code

**ADMINISTRATION CHECKLIST**

- ETHICAL LETTER
- ADD TO ATO PORTAL
- ADD TO PRACTICE MANAGER
- ADD EMAIL TO NEWSLETTER DATABASE
- ADD AS NEW CLIENTS TO AUDIT SHIELD
- ADD TO JOB MANAGER
- OTHER