

Client Details Form

Please email completed form to admin@dalcorpas.com.au with a copy of your Photo ID

CLIENT DETAILS

Full Name	<input type="text"/>
Date of Birth	<input type="text"/>
Tax File Number	<input type="text"/>
ABN	<input type="text"/>
Email address	<input type="text"/>
Occupation	<input type="text"/>

ADDRESS DETAILS

Home Address	<input type="text"/>
Postal Address	<input type="text"/>

TELEPHONE

Mobile No.	<input type="text"/>
Home No.	<input type="text"/>

BANK DETAILS

Account Name	<input type="text"/>
BSB	<input type="text"/>
Account No.	<input type="text"/>

SPOUSE / CHILDREN DETAILS

Spouse/Partner Name	<input type="text"/>
Spouse/Partner DOB	<input type="text"/>
Spouse/Partner Taxable Income	<input type="text"/>
No. of Dependent Children	<input type="text"/>
Private Health Insurance details	<input type="text"/>

BUSINESS ENTITY DETAILS (if applicable)

Sole Trader Partnership Company Trust Super Fund

Entity TFN	<input type="text"/>	Entity ABN	<input type="text"/>
Registered for GST	<input type="checkbox"/> YES <input type="checkbox"/> NO		
BAS Required	<input type="checkbox"/> YES <input type="checkbox"/> NO		
Ethical Letter Required	<input type="checkbox"/> YES <input type="checkbox"/> NO		
Dalcorp to act as ASIC Agent	<input type="checkbox"/> YES <input type="checkbox"/> NO		

Consent to Act - Individual

Registered Tax Agent / Accountant

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I hereby consent to the appointment of **Dalcorp Accounting Services Pty Ltd**
TAN 22115003 to act as the Registered Tax Agent and Accountant on behalf of:

Full Name

Date of Birth

Tax File Number

ABN (Sole traders only)

I accept that appointing your firm as my Tax Agent provides you with authority to prepare and lodge Australian Taxation Office documents and forms on my behalf, where appropriate and at your discretion. The documents and forms may relate to tax agent administration, income tax, Goods and Services Tax (GST), Pay As You Go (PAYG) and activity statement matters.

I hereby acknowledge that I have received and accept the terms of the engagement provided to me.

Furthermore, I authorise Dalcorp Accounting Services Pty Ltd to;

- Obtain information from our previous accountant and the Australian Taxation Office.
- Pass on taxation & financial information to banking/financial institutions at our request
- Add our details to the firms mailing list to receive electronic and paper-based correspondence.

Furthermore, I confirm;

- I have attached a copy of my photo ID for identification purposes
- I provide Dalcorp with express written authority to designate my preferred address(s) for service for ATO communications. Dalcorp has explained to me that some ATO communications may be sent or retrieved digitally and others will be sent by post.

My preferred **address** is:

- I provide Dalcorp with express written authority to use email as a preferred method of correspondence (where possible) for all taxation matters, forms and documents.

My preferred **email** is:

Signature _____

Date _____