|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **NEW CLIENTS FORM** | | | | |
| **ENTITY ONE** | **ENTITY TWO** | | | **ENTITY THREE** |
| NAME: | NAME: | | | NAME: |
| ACN: | ACN: | | | ACN: |
| ABN: | ABN: | | | ABN: |
| TFN: | TFN: | | | TFN: |
| NEW ENTITY: | NEW ENTITY: | | | NEW ENTITY: |
| MAIN BUSINESS ACTIVITY: | MAIN BUSINESS ACTIVITY: | | | MAIN BUSINESS ACTIVITY: |
| FAMILY GROUP: | FAMILY GROUP: | | | FAMILY GROUP: |
| **INDIVIDUAL ONE** | **INDIVIDUAL TWO** | | | **INDIVIDUAL THREE** |
| NAME:  . | NAME: | | | NAME: |
| TFN: | TFN: | | | TFN: |
| ABN: | ABN: | | | ABN: |
| DATE OF BIRTH:  .........../.........../............ | DATE OF BIRTH:  .........../.........../............ | | | DATE OF BIRTH:  .........../.........../............ |
| ADDRESS: | ADDRESS: | | | ADDRESS: |
| MOBILE: | MOBILE: | | | MOBILE: |
| EMAIL: | EMAIL: | | | EMAIL: |
| ASSOCIATED: | ASSOCIATED: | | | ASSOCIATED: |
| FAMILY GROUP: | FAMILY GROUP: | | | FAMILY GROUP: |
| **MAIN CONTACT DETAILS** | | | | |
| BUSINESS ADDRESS: | | | | |
| POSTAL ADDRESS: | | | | |
| ACCOUNTS CONTACT NUMBER: | | ACCOUNTS CONTACT EMAIL: | | |
| BUSINESS PH: | |  | BUSINESS FAX: | |

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| **OFFICE USE ONLY** | | | | | |
| **CLUSTOMER SERVICE** | | | **ACCOUNTANT** | |  |
| 🞏 | ADD CLIENTS TO ACCOUNTANTS OFFICE | 🞏 |
| 🞏 | ADD CLIENTS TO ATO PORTAL | 🞏 | SET UP MYOB FILE | 🞏 | ALLOCATED ACCOUNTANT: |
| 🞏 | ASIC FORM 362 (APPOINT AGENTS) | 🞏 | SET UP TAX RETURN | 🞏 | DATE CLIENT TAKEN ON: |
| 🞏 | ASIC FORM 484 (REGISTERED OFFICE ADDRESS) | 🞏 | CLIENT SPECIFIC | 🞏 | ................**/**..................**/**................ |
| 🞏 | ETHICAL LETTER TO PREVIOUS ACCOUNTANTS | 🞏 | GROUP STRUCTURE | 🞏 | AO CLIENT CODE: |
| 🞏 | ENGAGEMENT LETTER REQUIRED | 🞏 |  | 🞏 |  |
| 🞏 | SCAN & SAVE DOCUMENTATION | 🞏 |  | 🞏 |  |
| 🞏 | GIVE DOCUMENTATION TO ACCOUNTANT | 🞏 |  | 🞏 |  |