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| **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: |

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| **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 | 🞏 |  | 🞏 |  |