



New Client Information Sheet

Client: _____ Date: _____

Client Details: **PROOF OF IDENTITY (POI) MUST BE PROVIDED**

		Client 1	Client 2
1.	Title:		
2.	Last Name:		
3.	Given Names:		
4.	Date of Birth:		
5.	Tax File Number (TFN):		
6.	ABN (if applicable):		
7.	Occupation:		
8.	Mobile Number:		
9.	Email Address:		
10.	Physical Address:		
11.	Postal Address:		
12.	Bank Account Details: BSB Acc no Institution Account Holder		
13.	Residency Status:		
14.	Nationality:		
15.	Visa Number: Arrival Date: (if applicable)		
16.	Name and contact details of previous Tax Agent (if applicable to send Ethical Letter):		
17.	Director's ID (if applicable) or Other remarks:		

Documents to use for POI – 2 documents must be provided:

- Driver Licence
- Medicare Card
- Australian Passport

If you don't have the above, other Australian-issued identity documents you can use include:

- birth certificate
- change of name certificate
- marriage certificate
- citizen certificate
- certification of registration by descent
- ImmiCard
- Australian visa (if using a foreign passport)