INDIVIDUAL TAX RETURN

For the year ended 30 JuneClick here to enter year.

**Questionnaire**

New Client (please provide your previous year’s Income Tax Return)

|  |  |
| --- | --- |
| Referred by: |  |
| Tax File Number: |  |

Existing Client

|  |  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
| Client Name: |  | | | | DOB |  | | | Separate Net Income |
| Spouse Name: |  | | | | DOB |  | | |  |
| Dependent: |  | | | | DOB |  | | |  |
| Dependent: |  | | | | DOB |  | | |  |
| Street Address: |  | | | | | | | | |
| Postal Address: | Which postal address would you like us to provide the Australian Taxation Office?  T L C Taxation postal address or  Own postal address | | | | | | | | |
| Telephone No: | H |  | W |  | | | M |  | |
| Email Address: |  | | | | | | | | |
| Occupation: |  | | | | | | | | |
| Work to be  Completed: | Income Tax Return Business Setup Bookkeeping Services  Other Click here to enter text. | | | | | | | | |

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| --- | --- | --- | --- |
| |  |  |  | | --- | --- | --- | | **Tax return processing**  Ring for appointment  Email/Post all required documents  I will always require a hard copy  posted to me. | **Preferred Method Of Contact**  Face-to-face only  Registered Post  Email or social media  Phone calls and text messages | **Preferred Payment Method**  Cash  Cheque  Direct Debit  PayPal | |
| |  |  |  |  | | --- | --- | --- | --- | | EFT Details (for potential Income Tax Refund) | | Account Name: |  | | BSB: |  | Account Number: |  | |