

New Client Form

We have many clients like you who have a real passion for their business, and we would love to offer our services to you to both establish and grow your business.

Individual Client Details

Date

Surname

Mr/Mrs/Ms/Miss

Given Name/s

Date of Birth

Tax File No

Street Address

Postal Address

Home Phone

Work Phone

Mobile

Fax

Email address

Year last Tax Return was lodged with the Australian Taxation Office:

Name and contact details of previous accountant (if applicable):

Identification Provided (Two Types Required)

Drivers License

Medicare Card

Other

Fees for your initial consultation range from a rate of \$200 - \$325 per hour, based on the type of advice provided to you at the time of the meeting, and whether you engage us to provide services to you in the future. Ongoing fees can be charged either on an hourly basis or a pre-agreed fee. Please talk to us about which package works best for you.

Signature

Date

How did you hear about us?

Website www.accru.com

Referred by

Signage

Other

Prior to making an appointment with one of our staff members, did you look at our website, www.accru.com, and if so, did you find it valuable? Why/why not?

If you are interested in receiving a newsletter "Alert" (by email) relating to any of the following, please tick the appropriate box.

Tax

Audit

Financial Planning

Business Client Details

Business/Company Name

(Please detail trading name if different from Company Name.)

ABN

TFN

Are you currently registered for any of the following:

GST

PAYG Withholding

Other

Business Structure and Activities

(Please list all related entities, i.e. Partnership, Self Managed Superannuation Fund, Family Trust, etc. and their primary activity/ies.)

Does your business currently have any outstanding objections, disputes or liabilities?

Do you need your work finalised by a particular date and/or have a deadline in mind? (Please note that we will endeavour to undertake your work in a timely manner although sometimes jobs can take longer to complete than first anticipated due to unforeseen circumstances.)