

# DETAILS & PREFERENCES

YOUR NAME:

\_\_\_\_\_

PARTNER'S NAME:

\_\_\_\_\_

DATE OF BIRTH:

\_\_\_\_\_

PARTNER'S DOB:

\_\_\_\_\_

YOUR MOBILE:

\_\_\_\_\_

PARTNER'S MOBILE:

\_\_\_\_\_

YOUR EMAIL:

\_\_\_\_\_

PARTNER'S EMAIL:

\_\_\_\_\_

STREET ADDRESS:

\_\_\_\_\_

POSTAL ADDRESS:

\_\_\_\_\_

<b><u>BANK ACCOUNT DETAILS:</u></b>	<b>The tax office require your bank account details so they can deposit your refund directly into your account.</b>
<b>Account Name:</b>	
<b>BSB:</b>	<b>Account Number:</b>

<b><u>Names of Dependent Children</u></b>	<b><u>Date of Birth</u></b>	<b><u>Names of Dependent Children</u></b>	<b><u>Date of Birth</u></b>
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____

**Payment:** In the event that you receive a tax refund, would you like us to withdraw our preparation fee from this refund? **(If you chose this option we will use the account details above to transfer the balance)**

Yes  No

**Signing:** How would you like to the sign tax return(s)?

DocuSign (electronic signing)  Email  Our office  phone or sms (please circle) Post

## **INDIVIDUALS ONLY**

As your tax returns are not due for lodgement until March 2024, please indicate the period that would be preferred for completion:

2 - 4 weeks  Anytime before Due Date  Need ASAP for finance

## **BUSINESS CLIENTS**

As business returns are more complex, the usual time needed to complete your financial reports and/or income tax return(s) **will be a minimum of nine weeks**. As July to September is our peak period we would appreciate if you could consider dropping in your information after September.