

DETAILS & PREFERENCES

YOUR NAME:

SPOUSE'S NAME:

DATE OF BIRTH:

SPOUSE'S DOB:

YOUR MOBILE:

SPOUSE'S MOBILE:

YOUR EMAIL:

SPOUSE'S EMAIL:

STREET ADDRESS:

POSTAL ADDRESS:

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

**Names of Dependent
Children**

Date of Birth

**Names of Dependent
Children**

Date of Birth

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)**

*****PLEASE NOTE THIS WILL NOW INCUR AN ADDITIONAL FEE OF \$21*****

Yes ☐ No ☐

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

DocuSign (electronic signing) ☐ Email ☐ At our office ☐ phone or SMS (please circle) Post ☐

Tax Pack: How would you prefer to receive our tax pack next year? Post ☐ or Email ☐

INDIVIDUALS ONLY

As your tax returns are not due for lodgement until March 2026, please indicate the period that would be preferred for completion:

☐ 2 - 4 weeks ☐ Anytime before Due Date

BUSINESS CLIENTS

Business returns are more complex, so 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.