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### New Client Details – Individuals

#### Client Contact Information

Full Name \_\_\_\_\_

Have you changed your name since your last tax return?  Yes  No

Previous Name \_\_\_\_\_

Date of Birth \_\_\_\_\_

Tax File Number \_\_\_\_\_ ABN (if applicable) \_\_\_\_\_

Street Address \_\_\_\_\_

Have you changed your address since your last tax return?  Yes  No

Postal Address \_\_\_\_\_

Contact Number \_\_\_\_\_ Alternative Number \_\_\_\_\_

Email \_\_\_\_\_

Relationship Status  Single  Married\*  De Facto\*  Widowed

Have you changed your relationship status since your last tax return?  Yes\*  No

Do you have any dependants living with you?  Yes\*\*  No

Are you a sole trader?  Yes  No

*\* Please complete Spouse / Defacto Information below*

*\*\* Please complete Dependants Details below*

#### Electronic Banking Details (for refunds)

Account Name \_\_\_\_\_

BSB \_\_\_\_\_ Account Number \_\_\_\_\_

#### Spouse / Defacto Information - if applicable

Full Name \_\_\_\_\_

Date of Birth \_\_\_\_\_

Tax File Number \_\_\_\_\_ Approx. Income \_\_\_\_\_

**Dependants Details - if applicable**

Is the dependant a child under 24 years old and a full-time student at a school, college or university?  Yes\*  No

Is the dependant a parent or parent in law?  Yes\*  No

*\* Please complete Dependant's details below*

Dependant's Full Name	Date of Birth
1. _____	_____
2. _____	_____
3. _____	_____
4. _____	_____

**Occupation Details**

What is your occupation? \_\_\_\_\_

Have you had a change in occupation or started a new job during the income year? If yes, please give details below.  Yes  No

Details \_\_\_\_\_

**Assets Details**

Did you buy or sell any assets during the income year? If yes, please provide details below.  Yes  No

Details of Asset	Bought	Sold
1. _____	<input type="checkbox"/>	<input type="checkbox"/>
2. _____	<input type="checkbox"/>	<input type="checkbox"/>
3. _____	<input type="checkbox"/>	<input type="checkbox"/>
4. _____	<input type="checkbox"/>	<input type="checkbox"/>

**Previous Tax Return Information**

Was last year's return prepared by a registered tax agent?  Yes  No

Name of Agent \_\_\_\_\_

Address \_\_\_\_\_

Details of Work Done \_\_\_\_\_

## Engagement

You are engaging Desborough Accountants to assist with the preparation and lodgment of your taxation return.

It is important for you to understand that:

- ➔ You are responsible for the accuracy and completeness of the particulars and information provided to us by you.
- ➔ Any advice we provide is only an opinion based on our knowledge of your particular circumstances.
- ➔ You have obligations under the self-assessment regime to keep full and proper records in order to facilitate the preparation of accurate returns.
- ➔ We cannot provide taxation services if we find that information on which those services are to be based contain false or misleading information, or omit material information, and you are not prepared to appropriately amend that information.

We can specifically advise as to the requirements of the substantiation provisions relating to your income tax return and of the necessity to obtain acceptable receipts as specifically required by the legislation. Please ask us if you are unsure of your responsibilities. Please note that we will not be checking that the requirements of the substantiation provisions have been satisfied, this is your responsibility.

When preparing your return, we may identify one or more issues that are not clear under the tax laws. Where we have pointed out such issues to you, you have a right to request a Private Binding Ruling from the ATO. Upon providing the ATO with all the relevant facts, they will provide you with a ruling setting out their view on the proper tax treatment of the issue requested to be ruled upon.

Our fee terms are seven days, and our policy is to lodge your tax returns once your account is settled. The fee for this service does not cover any inquiries made to us or investigations involving us conducted by the ATO. Substantial penalties apply for an incorrectly prepared income tax return. If you have any queries in respect to this, please contact our office for assistance.

## Signature

I declare that the above information is correct and that I understand the terms of the engagement with Desborough Accountants.

Signature \_\_\_\_\_

Date \_\_\_\_\_

## Signing Options

Please indicate if you would prefer to;

Sign your documents digitally via Client Portal\*

\*How would you like your original documents returned to you?

Pick Up

Post

Collect your finished tax return from our office to sign

Have your tax return posted to you for signing

## Client Portal

Our Client Portal is an easy to use, secure way for you to upload and download documents, data files and reports at your own convenience. The Client Portal allows you to access relevant files at any time. You can review and sign your tax return online via an authenticated digital signing function.

Please remember to notify us once you have completed uploading any relevant documents for work to be completed.

The below email address will be used for your client portal login, this email must be a unique email address that is not used by other people.

Email \_\_\_\_\_

By signing this document, you are acknowledging that:

- ➔ The email address you have provided is yours alone and that no one else has access to it.
- ➔ You consent to Desborough Accountants setting up a client portal login with the provided email address and uploading your tax returns and other documents for your private access.
- ➔ You and you alone, will be responsible for using the digit signature function to sign any documents that are uploaded with a signature request.

Signature \_\_\_\_\_

Date \_\_\_\_\_

Please tick all items that are relevant to you during the period 1 July 2023 to 30 June 2024.

### Income

- Income earned from employment
- Bank interest earned from an Australian bank account
- Receipt of any Government pensions (e.g. age pension, jobseeker, disability)
- Ownership of private or public shares, including any purchases or sales during the year
- Investment in managed investments/funds
- An interest in or investment in any partnerships or other trusts
- Holdings (including any purchases, trades or sales) of cryptocurrency
- Ownership of any foreign assets
- Foreign income earned (e.g. investment properties, pensions, bank interest, business income)
- Income earned from running a business
- Investment property ownership
- Income earned from renting part or all of your home (including on a short-term basis)
- Participation in ride share activities (e.g. Uber)
- Other income – *please provide details* \_\_\_\_\_

### Expenses/Deductions

- Personal superannuation contributions – *Do you have confirmation from your super fund? YES / NO*
- Tax deductible donations
- Work related motor vehicle use
- Worked from home
- Work related mobile phone use
- Uniform costs (with a registered logo) and/or protective clothing (e.g. steel cap boots, aprons, hats)
- Union fees
- Professional memberships or subscriptions
- Work related education costs or seminars
- Work related tools/equipment
- Any other work-related expenses
- Tax agent fees (excluding Desborough Accountant fees)
- Income protection insurance (does not include insurance within your superannuation fund)
- Lived in a remote area of Australia
- Moved overseas to live or returned from overseas to live in Australia.
- Other expenses/deductions – *please provide details* \_\_\_\_\_

### Other Information – please answer the following questions

- ➔ Were there any changes to your relationships with dependents during the year (e.g. a new spouse, separation, new children born, adult children left home)?  
 Yes       No
- ➔ Were all your dependents (spouse and children) covered by private hospital cover for the full financial year?  
 Yes       No

*Please see our "What To Provide" document for details on what other information we will require from you.*