







New Client Profile

Client Details

First Name		Date of Birth	/ /
Middle Name		Tax File Number	
Last Name		Mobile Phone	
Preferred Name		Home Phone	
Email Address 			
Home Address 			
Postal Address 			

Spouse Details (if applicable)

First Name		Date of Birth	/ /
Middle Name		Tax File Number	
Last Name		Mobile Phone	
Preferred Name		Home Phone	
Email Address 			
Home Address 			
Postal Address 			

Banking Details

Client Bank Details		Spouse Bank Details (if using different bank)	
Account Name		Account Name	
BSB		BSB	
Account Number		Account Number	

Other

Last year tax return lodged	
How did you hear about Agilis?	
Is there any paperwork that you are leaving with us today that you would like returned?	
Previous Accountant (if applicable)	
Previous Accountant Contact email/phone:	
QBCC Details (if applicable)	
ASIC Details (if applicable)	

When your tax returns are ready, would you like to: (please tick one)

<input type="checkbox"/>	Sign your tax return via E-sign	<input type="checkbox"/>	Have your tax returns posted to you
<input type="checkbox"/>	Have your tax returns emailed to you	<input type="checkbox"/>	Sign your tax return at our office

Do you have a Sole Trader ABN, Company, Trust, Partnership or SMSF? If so, please provide any details here:

Please note that clients are required to pay the Agilis invoice on the day of completion or within 14 days:

Signed: _____

Date: _____