



New Client Information

Date:

Mr ☐ Mrs ☐ Ms ☐ Miss ☐ Other: ☐

Surname:

Given Names:

Preferred Name:

Date of Birth:

Home Address:

Postal Address:

Mobile:

Home Phone:

Email:

Occupation:

Tax File Number:

Note: Please do not email your TFN. Contact us for options.

I have been informed that DMK Taxation & Business Solutions will use my personal details to access information from the ATO Tax Agent Portal.

Signed:.....

Please bring to appointment if applicable:

BANKING DETAILS FOR ANY ATO REFUNDS TO BE DEPOSITED INTO	
Account Name:	
BSB:	Account Number:
PROOF OF INCOME	
	All PAYG Summaries from Employer(s)
	Any Investment Income: <ul style="list-style-type: none">• Bank Interest• Managed Fund Investments• Dividends• Rental Properties
WORK RELATED EXPENSES	
	Work related travel expenses <ul style="list-style-type: none">• Log book, or• Business kilometres travelled• Travel and/or living away from home costs
	Work other <ul style="list-style-type: none">• Union dues• Subscriptions/memberships• Tools• Self-education expenses• Protective clothing
OTHER EXPENSES	
	Superannuation Contributions <ul style="list-style-type: none">• Any additional superannuation contributions (salary sacrifice, spouse contributions etc)
	Insurance <ul style="list-style-type: none">• Health Insurance• Income Protection
	Donations