

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:

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

Signed:.....

PHOTO ID WILL ALSO BE REQUESTED

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

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