

REQUEST FOR ENGAGEMENT BY TANGIBLE ASSETS PREFERRED AND RECOMMENDED TAX ACCOUNTANTS

PERSONAL INFORMATION

Client Name	
Address	Street
	Suburb
	State
	Postcode
Contact Details	Telephone (H)
	Telephone (B)
	Facsimile
	Mobile
	Email
Latest income tax return lodged	Year Lodged
Associated person(s) requiring income tax return preparation (e.g. Spouse)	
Current accountant	Name of Firm
	Contact Name
	Telephone No

NOTE:

The provision of personal details relating to your tax position is essential to the engagement process. All information provided will be retained in the strictest confidence.

CORPORATE ENTITIES INFORMATION

(NOTE: If insufficient space, please attach separate sheet with relevant details)

Entity Details	Entity Type	Entity Name		
Name	Corporate Trustee			
	Discretionary Trust (1)			
	Discretionary Trust (2)			
	"Bucket Company"			
	SMSF			
Commencement date	Corporate Trustee			
	Discretionary Trust (1)			
	Discretionary Trust (2)			
	"Bucket Company"			
	SMSF			
Registered address	Corporate Trustee			
	Discretionary Trust (1)			
	Discretionary Trust (2)			
	"Bucket Company"			
	SMSF			
Postal address	Corporate Trustee			
	Discretionary Trust (1)			
	Discretionary Trust (2)			
	"Bucket Company"			
	SMSF			
		ACN	ABN	TFN
Official registrations: (If also registered for GST, please place a tick (√) before the ABN)	Corporate Trustee			
	Discretionary Trust (1)	N/A		
	Discretionary Trust (2)	N/A		
	"Bucket Company"			
	SMSF			
Line Of Credit	Value	\$		
	Secured Against			
Share Trading Activity	Share Portfolio Value	\$		
	Margin Lend Value	\$		
Investment Properties	Total Market Value	\$		
	Total Debt	\$		
	Total Equity	\$		
Current share trading software				
Current accounting software (if any)				

COMPLETE AND FAX BACK TO JULIANNE ON (02) 9899 4943