

Personal Checklist



COOPER'S
ACCOUNTING

If a new client please fill out all sections,
If a returning client just fill out any changes to your details
When complete you can easily just upload to our website or bring to your appointment

| | |
|-------------------------------------|--------------------------|
| Full Name: | |
| Full Address: | |
| Tax File Number: | |
| Date of Birth: | |
| ABN if a business: | |
| Home Phone: | |
| Mobile Number: | |
| Email Address: | |
| Main Occupation: | |
| Resident for tax purposes YES or NO | IF NO state date arrived |
| Number of Dependant Children: | |

Bank Account Details for refunds are necessary as ATO will no longer send cheques and cannot lodge tax return without them

Account Name:

BSB:

Account Number:

Spouse's Details if Applicable

Full Name:

Date of Birth :

Spouses Gender:

Spouse's taxable Income:

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