

Personal Checklist



If you are a new client please fill out all sections, If you are a returning client just fill out any changes to your details. When complete you can easily just upload to our website **Here** or email it directly to admin@coopersaccounting.com.au

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	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:

PO BOX 3073 Thornton, NSW 2322

Office: 02 4932 4589 Mobile: 0431 204 033

Email: Helen@coopersaccounting.com.au Website: www.coopersaccounting.com.au