

Individual Tax Client Intake & Authority Form

1. Client Information

Full Name: _____ Date of Birth: ____/____/____ TFN: _____

Gender: Male / Female Email: _____ Mobile: _____

Postal Address: _____

Residential Address: _____

2. Spouse Information (if applicable)

Full Name: _____ DOB: ____/____/____ Estimated Taxable Income: _____

Gender: Male / Female Residency: Australian Resident Non-resident

Note: Required by ATO even if spouse has no income.

3. Income information for Fiscal Year _____ (Please tick applicable, we will discuss details with you)

 Salary/Wages (PAYG) (Prefilled) - Occupation: _____ Bank Interest (Prefilled) Government Payments (Centrelink) (Prefilled) Business Income (ABN Sole Trader) (Partial prefill – full records required) Rental Income (Not prefilled – full details required) Investment Income (Partial prefill– full details required)

- Dividends
- Trust distributions
- Interest from investment entities (including loans to companies / private lending)

 Capital Gains (Not prefilled – full details required)

- Property
- Shares / Managed Funds
- Crypto
- Other assets

 Superannuation / Lump Sum / ETP (Partial prefill) Employee Share Scheme ESS (Partial prefill) Insurance Income (Not always prefilled) Foreign Income (Not prefilled) Other Income, please provide details _____

Note: Prefill data may be incomplete. Please check tax return with your records or provide documents where possible.

4. Additional Information

Dependent children: Yes / No Number: _____

Bank Details for Refund: Account Name _____ BSB _____ Account No _____

5. Authority & Declaration

I authorise TAKO ACCOUNTANT SERVICES PTY LTD to act as my tax agent with the ATO. I declare all information is true and correct.

Signature: _____

Date: _____