

NEW CLIENT DETAILS FORM

Once filled out, please send through to: wardstax@wardstax.com.au

Title: _____

*

First Name: _____

Middle Name: _____

Surname _____

NOTE: If your name has changed since you last lodged a Tax Return please write the name that the Tax Office knows you by:

Do you have a **University, TAFE or Trade Loan?** YES NO

*Address: _____

*Suburb _____

State _____

Postcode _____

*Postal Address: _____

(If different from above)

*Suburb _____

State _____

Postcode _____

*Date of Birth: _____

How many years (tax) are we doing for you today? _____

*Tax File Number: _____

Telephone Numbers & Email address:

Work: _____ Home: _____

*Mobile: _____

Fax: _____

*Email: _____

Bank account details

(Tax Office requirement for your refund.)

*Name on Account: _____

(e.g. Fred E Citizen)

*BSB: _____

(6 digits)

*Account No: _____

*Name of person completing form: _____ Signature: _____

OFFICE USE ONLY

New Tax Office requirement
Photo ID to be sighted by the Tax
Agent

Drivers Licence

Student ID

18 Plus Card