

New Client Form



We appreciate you taking the time to complete the following details.

If you have any questions in relation to the form, please do not hesitate to ask for assistance.
Please refer to the glossary on page 3 for further information on certain terms.

Title	Given Name(s)	Surname
Preferred Name (Salutation)		Date of Birth
Tax File Number ⁱ	Director Identification Number ⁱⁱ	Australian Business Number

Residential Address				
Street				
Suburb		State		Post Code
Postal Address				
Street				
Suburb		State		Post Code

Contact details	
Email Address	
Mobile Number	
Phone Number <i>(if applicable)</i>	
Work Phone:	

Associates and dependants, you would like Kinsella to act for as tax agent		
Full Name	ABN/ ACN	Tax File Number



Professional Advisors if applicable		
Financial Advisor	Contact Details	
Legal Advisor	Contact Details	
Bookkeeper	Contact Details	
Bank Manager	Contact Details	
Do you have a current accountant ⁱⁱⁱ	Yes <input type="checkbox"/>	No <input type="checkbox"/>
Current Accountants Details		
Do you provide permission to contact the previous accountant.	Yes <input type="checkbox"/>	No <input type="checkbox"/>

Identity Check	
Please choose one of the following options so Kinsella may confirm your identity. ^{iv}	
Schedule a Microsoft Teams meeting with someone in our Administration team	<input type="checkbox"/>
Arrange to come to Kinsella's office and verify in person with a team member. <i>(Please email info@kinsella.com.au to arrange a suitable time or call us on 02 6262 6655)</i>	<input type="checkbox"/>

Glossary of Terms

ⁱ **A Tax File Number** is a 9-digit unique number which is allocated to one individual or entity and is a confidential information and should only be used or disclosed by authorised persons.

ⁱⁱ **A Director Identification Number** is a 15-Digit identifier given to a director (or someone who intends to become a director) who has verified their identity with the Australian Business Registry Services. To apply for a director Identification number, please visit the ABRS Website.

ⁱⁱⁱ Professional clearance is a letter that we usually require to send to your old accountant to ask for information and documents relating to you and your tax matters. It includes a request for your documents and information so they can take over your accounting and tax affairs.

^{iv} In conjunction with the Tax Practitioner's Board (TPB) the Australian Taxation office requires all **tax agents to verify their clients** via 2 proof of identity documents.