

Personal Details

Title: Mr <input type="checkbox"/> Miss <input type="checkbox"/> Ms <input type="checkbox"/> Mrs <input type="checkbox"/>	Visa Status:
First Name:	BSB: Account No.
Last Name:	Account Name:
Date of Birth: / /	No. of Dependents:
Gender: <input type="checkbox"/> Male <input type="checkbox"/> Female <input type="checkbox"/> Others	Spouse First Name:
Occupation:	Spouse Last Name:
ABN:	Spouse Date of Birth: / /
TFN:	Spouse Income:

Contact Details

Email Address:	
Home Telephone No.:	Mobile Number:

Residential Address:		
Suburb:	Postcode:	State:

(If different than residential)

Postal Address:		
Suburb:	Postcode:	State:

OTHER SERVICES (You may have interest)

FINANCE SERVICES - Do you have existing loans / mortgages?	
Would a free appraisal be helpful to check if you are paying too much interest?	YES <input type="checkbox"/> NO <input type="checkbox"/>
Are you seeking for refinance your existing home loans?	YES <input type="checkbox"/> NO <input type="checkbox"/>
Are you looking to consolidate your debts, reduce repayments and save on interest?	YES <input type="checkbox"/> NO <input type="checkbox"/>
Are you looking for a home loan?	YES <input type="checkbox"/> NO <input type="checkbox"/>
Are you interested in a property investment loan?	YES <input type="checkbox"/> NO <input type="checkbox"/>
Do you need commercial loan for your business?	YES <input type="checkbox"/> NO <input type="checkbox"/>
Are you looking for a personal / car loan?	YES <input type="checkbox"/> NO <input type="checkbox"/>
INSURANCE SERVICES	
Do you have a Business Insurance?	YES <input type="checkbox"/> NO <input type="checkbox"/>
Do you have a Personal Insurance?	YES <input type="checkbox"/> NO <input type="checkbox"/>
Do you have any Other Insurance?	YES <input type="checkbox"/> NO <input type="checkbox"/>
OTHER ACCOUNTING SERVICES	
Do you want tax planning services for future years ?	YES <input type="checkbox"/> NO <input type="checkbox"/>
Do you want any tax stationary ?	YES <input type="checkbox"/> NO <input type="checkbox"/>
Do you require income verification letter ?	YES <input type="checkbox"/> NO <input type="checkbox"/>
Do you want ATO Audit Insurance ?	YES <input type="checkbox"/> NO <input type="checkbox"/>
Do you want to consider setting up a SMSF to save on tax ?	YES <input type="checkbox"/> NO <input type="checkbox"/>

Would you like to receive our newsletters? YES NO

How do you come to know about Aumre Financial Group? 1. Physical Advertisement 2. Facebook 3. Website 4. Referral 5.

TERMS OF ENGAGEMENT

Confirming our discussions, we are pleased to accept appointment as your Tax Agent. We will act in your best interest at all times and provide the highest level of professional service. This document sets out the terms of the engagement. Any additional work will be by the written agreement of both parties. We will commence your work subject to signing and accepting of this agreement and returning it to us via post, email at accountant@aumregroup.com.au

- The scope of work is as agreed. You are responsible for compliance with the substantial provisions of the Income Tax assessment Act. You are responsible for the timely provision of information and we will not be responsible for any late lodgment or other fees brought about by your failure to act in a timely manner.
- We will analyse, discuss and make recommendations regarding your tax return, prepare and electronically lodge your tax return for the year as above.
- Please note that any refund is an estimate only and we are not responsible and do not accept liability if the Australian Taxation Office determines an outcome which is different than that lodged.
- We have the duty to act in our client's best interests, however, the duty is subject to an overriding obligation to comply with the law, even if that may require us to act in a manner that may be contrary to your discretions. For example, we could not lodge a tax return that we believe to be false in a material respect.
- Interest on overdue amounts charged at a rate of **2.0%** per calendar month or part thereof, and the Customer shall be liable for, and expressly undertakes to pay, all such interest.
- Should the Supplier incur legal and/or any other expenses, including any such expenses to any collection agency, in obtaining, or attempting to obtain, payment for any amount due by the customer, the customer shall be liable for all such expenses (on a full indemnity basis). The Customer acknowledges that the collection expenses may be calculated on a commission basis at a percentage rate of up to 25% of the amount due and expressly agrees to pay those expenses irrespective of the amount of work performed by the collection agency.
- As members of an accounting body and we are subject to periodic Professional Quality Assurance. Reviews. Unless otherwise advised, you are consenting to your file being part of such a review. This review is of our client records and not of you as a client and you have full assurances that complete confidentiality will be maintained throughout. We also adhere to strict privacy policies.
- The Aumre Financial Group assures that your information will be kept private according to our Privacy Policy.
- The standard professional fees are (subject to notification of change) \$50 per hour for secretarial, \$100 per hour for accountant and \$250 per hour with principle (prorata). Terms of payment are as per invoice provided.

CLIENT SUBSTANTIATION DECLARATION

I, _____ confirm that I have been advised by Aumre Financial Group as to the requirement to demonstrate that an expense has been incurred for deductible purposes, together with satisfying the SUBSTANTIATION legislation in relation to expenses mentioned in your tax return. In addition, I have been informed by you of the need to OBTAIN ORIGINAL RECEIPTS, detailing the;

- Name of supplier
- Date expense was incurred
- Type of goods / service purchased
- Amount expressed in the currency it was incurred

I have also been advised by you of the need to keep the written evidence for at last 5 years and the consequences and penalties which will arise if the information I have provided is incomplete or incorrect.

I have all the income tax and SUBSTANTIATION DOCUMENTS necessary to support all the claims made in my income tax return.

Where items are used for both business and private purposes, e.g. car, telephone/mobile, computer, library etc., I advise that I have kept appropriate apportionment documents to verify my business usage claim. Further, I have instructed you to prepare the return based on my specific instructions. I have read and understood the return prepared for me.

I DECLARE

1. I have disclosed to you all the income which I have earned.
2. That all the income has been declared in the return.
3. That all the claims for deductions and rebates which have been included in the return are based on my specific instructions.
4. That while I did not have the receipts to substantiate the above claims at the meeting, I will be instructed you to prepare the return based on my specific instructions.
5. That you have clarified what written evidence will be required during an audit and penalties that may be applicable if incorrect claims are identified.

CLIENT:

ACCOUNTANT:

NAME: _____

NAME: _____

SIGN: _____

SIGN: _____

DATE: _____ / _____ / _____

DATE: _____ / _____ / _____