

2018 Client Profile Form

(All new and existing clients to complete)

____/____/____

CURRENT INFORMATION	
Preferred Name	
Title	
Given Name(s)	
Surname	
E-mail Address 1	
E-mail Address 2	
Address (physical) <small>P.O. Box not acceptable</small>	
Address (postal) <small>Put 'as above' if the same</small>	
Telephone contacts	Mobile: Work: Home: Skype:

Please help us to help you.

At Good Life Accounting we aim to help you reach your financial goals and cover your risks along the way. We have developed strategic alliances with trusted professionals. As a function of our duty of care, we recommend that you seek advice with regards to all aspects of your financial situation. Which of the following areas do you consider the highest priorities for your current and/or future financial needs:

- | | |
|---|--|
| <input type="checkbox"/> Retirement Planning | <input type="checkbox"/> Self Managed Super Funds |
| <input type="checkbox"/> Wealth Creation | <input type="checkbox"/> Superannuation/Rollovers |
| <input type="checkbox"/> Estate Planning | <input type="checkbox"/> Personal Risk Insurances |
| <input type="checkbox"/> Audit Insurance | <input type="checkbox"/> Testamentary Trust |
| <input type="checkbox"/> Debt Reduction/Consolidation | <input type="checkbox"/> Free subscription to our regular newsletter with all the latest updates in taxation |
| <input type="checkbox"/> Other – see over for a full list of services offered | |

Thank you for helping us to help you. Someone will be in touch soon.

e: accountants@petersobczuk.com.au | m: 0433 877 007 | w: www.petersobczuk.com.au

a: Shop 8, Comino's Arcade, 133 Redcliffe Parade, REDCLIFFE QLD 4020



<input type="checkbox"/>	Advice - Audit - per hour	<input type="checkbox"/>	BSA Audit Reports
<input type="checkbox"/>	Advice - Estate Planning	<input type="checkbox"/>	Company - dividend minutes
<input type="checkbox"/>	Advice - initial introductory meeting	<input type="checkbox"/>	Company - tax return
<input type="checkbox"/>	Advice - Retirement Planning	<input type="checkbox"/>	FBT return
<input type="checkbox"/>	Advice - taxation and accounting	<input type="checkbox"/>	Incorporation of a new company
<input type="checkbox"/>	Advice - Wealth Creation	<input type="checkbox"/>	IAS - preparation and lodgement form client reports
<input type="checkbox"/>	Advice - Board Meetings	<input type="checkbox"/>	Individual - income tax return
<input type="checkbox"/>	Advice - Business Health Check	<input type="checkbox"/>	Insurance - individual - income protection
<input type="checkbox"/>	Advice - Structure	<input type="checkbox"/>	Insurance - individual – life
<input type="checkbox"/>	Advice - Asset Protection	<input type="checkbox"/>	Insurance - individual – TPD
<input type="checkbox"/>	Advice - Exit Strategy	<input type="checkbox"/>	Accounting and taxation records sent to third parties
<input type="checkbox"/>	Advice - SWOT Analysis	<input type="checkbox"/>	Partnership - Financial Statements
<input type="checkbox"/>	Application for ABN	<input type="checkbox"/>	Partnership - income tax return
<input type="checkbox"/>	Application for ABN & TFN	<input type="checkbox"/>	Payroll processing
<input type="checkbox"/>	Application for GST deregistration	<input type="checkbox"/>	Payroll processing - Superannuation Reconciliation
<input type="checkbox"/>	Application for GST Registration	<input type="checkbox"/>	Private Ruling Applications
<input type="checkbox"/>	Application for GST registration & PAYG Withholding	<input type="checkbox"/>	Super Guarantee Charge Calculations
<input type="checkbox"/>	Application for PAYG Withholding	<input type="checkbox"/>	SMSF - Incorporation and Establishment of relevant entities
<input type="checkbox"/>	Application for registration of FBT	<input type="checkbox"/>	Establishment of a new trust
<input type="checkbox"/>	Application for registered business name	<input type="checkbox"/>	Establishment of a new trust & Incorporation of a new company
<input type="checkbox"/>	Application for TFN	<input type="checkbox"/>	Trust - Financial Statements
<input type="checkbox"/>	ASIC - Change Company Name	<input type="checkbox"/>	Trust distribution minutes
<input type="checkbox"/>	ASIC - Registered Agent	<input type="checkbox"/>	Trust - income tax return
<input type="checkbox"/>	ATO – Liaising	<input type="checkbox"/>	Trust - Trustee Resolution
<input type="checkbox"/>	ATO debt negotiation – basic	<input type="checkbox"/>	Xero - Accounting Package - Business Large
<input type="checkbox"/>	ATO debt negotiation – extensive	<input type="checkbox"/>	Xero - Accounting Package - Business Medium
<input type="checkbox"/>	BAS - preparation and lodgement from client reports	<input type="checkbox"/>	Xero - Accounting Package - Business Small
<input type="checkbox"/>	BAS - quarterly bookkeeping - extensive transactions	<input type="checkbox"/>	Xero - Enter conversion balances from previous accounting package
<input type="checkbox"/>	BAS - quarterly bookkeeping - limited transactions	<input type="checkbox"/>	Xero - Set up new employees for payroll
<input type="checkbox"/>	Confirmation of income, profit/loss or ATO debts for the purpose of borrowing	<input type="checkbox"/>	

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