

2025 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) P.O. Box not acceptable	
Address (postal) Put 'as above' if the same	
Telephone contacts	Mobile: Home: Work: 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:

- | | |
|---|--|
| ☐ Retirement Planning | ☐ Self Managed Super Funds |
| ☐ Wealth Creation | ☐ Superannuation/Rollovers |
| ☐ Estate Planning | ☐ Personal Risk Insurances |
| ☐ Audit Insurance | ☐ Testamentary Trust |
| ☐ Debt Reduction/Consolidation | ☐ Free subscription to our regular newsletter |
| ☐ Other – see over for a full list of services | |

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

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