



*** Please complete ALL sections or write N/A (not applicable) ***

YOUR INFORMATION

Tax File Number _____

MR / MRS / MS / MISS / DR (please circle)

Ref Code (office use only) _____

1. Family Name _____ First Name _____

Postal Address _____

Residential Address _____

(if same as postal, please write "As above")

Email _____ Date of birth ____/____/____

Mobile # _____ Home # _____ Fax # _____

2. Name of Workplace #1 _____ Job title _____

Name of Workplace #2 _____ Job title _____

(more pace located on the next page)

3. Are you a single parent? YES NO Do your children live with you? YES NO

Your children's names

_____ Date of Birth or Age _____

_____ Date of Birth or Age _____

_____ Date of Birth or Age _____

_____ Date of Birth or Age _____

4. Do you have any investment properties? YES NO

5. Any ABN Income? YES NO

6. Any Private Health Cover? YES NO

7. Did you use Trezona Accounting last year? YES NO

If you used another tax agent, how much were your preparation fees? _____ (approx.)

Important: The tax law imposes heavy penalties for giving false or misleading information

FOR ANY REFUND

8. Bank Name _____ BSB _____ Acc No. _____

If you prefer to collect a cash cheque, please indicate YES NO

YOUR SPOUSE

9. MR / MRS / MS / MISS / DR (please circle)

Family Name _____ First Name _____

Spouse date of birth ____/____/____ Spouse Income \$ _____ (approx. if not known)

Tax File Number _____ Mobile _____ Home # _____

Please turn over for further information

ADDITIONAL INFORMATION

Name of Workplace #4 _____ Job title _____

Name of Workplace #5 _____ Job title _____

Name of Workplace #6 _____ Job title _____

DECLARATION

10. I declare that

- the information provided to the agent for the preparation of the document is true and correct, and
- the agent is authorised to lodge this tax return
- the agent is also authorised to prepare and lodge overdue returns (if any) including returns listed as Not Necessary
- the calculation of additional preparation fees is based on the current Schedule of Fees

I hereby authorise BMT Business Services Pty Ltd to immediately pay my **tax refund cheque**, or my **tax refund direct credit**, received by you on my account in respect to the preparation and lodgement of my income tax return, into a Trust Account operated by you at the Bendigo Bank, Gregory Terrace, Alice Springs.

I further authorise you, in consideration of the preparation and lodgement of my income tax return, to deduct from trust money so held the amount noted below and forward the balance of the account to me at the address shown above, or to my nominee whose name and address I have added to this letter [please refer overleaf], or to direct credit my designated bank account.

I further authorise your professional institution to use any information on such files or records for the sole purpose of its audit and quality reviews as set out in the Quality Control Manual and Members Handbook.

This authority is strictly limited to the preparation and lodgement of the Income Tax Returns enclosed herewith.

Return Preparation: Self _____

Fee to deduct from refund _____

TOTAL FEE \$ _____

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Signature of Taxpayer _____ **Date** ____/____/____