



**AV CHARTERED
ACCOUNTANTS**

COMMITTED TO YOUR
BUSINESS SUCCESS

Date

Client Meeting Checklist - Individuals

(One form per client. Please supply last 2 years tax returns)

| | | | |
|---|---|--------------------------|-------------|
| Name | | | |
| Home Address | | | |
| Postal Address | | | |
| Date of Birth | | | |
| Date of Death <small>(if Deceased Estate)</small> | | | |
| TFN | | | |
| Contact Number | H: | W: | M: |
| Email Address | <i>Note: For our signing Portal, each client must have their own email address</i> | | |
| Email No 1: | | | |
| Email No 2: | | | |
| Dependants <small>(Name & DOB)</small> | Name(s): | Date(s) of Birth: | |
| Dependent 1 | | | |
| Dependent 2 | | | |
| Bank Acct Details <small>(for refunds)</small> | BSB: | A/c No: | |
| Correspondence Preference | A/c Name: | | |
| | <i>The preferred method of correspondence is our AV Portal. Our portal provides secure access to your AVCA-prepared financial documents for current and previous years and enables electronic approval for lodgements. It's efficient, user-friendly, and most importantly, it reduces waste which is better for the environment. If you want your preference changed to Post, please tick the Post box, and our Admin team will consider your request.</i> | | |
| | Portal | <input type="checkbox"/> | Post |
| Authorisation | Please add me and my various entities to your Tax Agent Listing and ATO Portal and ASIC Agent (if applicable). I authorise AV Chartered Accountants to submit documents to the Commissioner on behalf of me and my various entities. | | |
| Client ID | Please attach copies of Drivers Licence and Medicare Card | | |
| Extra / Notes | | | |