



ezytax  
BLUE

client info  
form

## CLIENT INFO FORM

Every client completing a tax return needs to complete the Client Information Form (CIF) *regardless* of whether they are an existing customer or not. This form ensures we have a hard copy of every client's most up-to-date information. Do **NOT** complete this on behalf of the Client. Client **MUST** complete themselves in *their* handwriting. You can help them complete the form by telling them what to write.

Ensure the form is completed as thoroughly as possible and by the client:

Question 1 to 6 are personal information and are required for the data to be entered in both MYOBAO and the Client's tax return.

Question 7 to 9 are more detailed information about the Client's income and information required to complete the return.

Question 10 is the Client's bank details. This section only needs to be completed if the client is paying **CASH**. If the client is paying via **TRUST** they need to also complete a **Trust A/c Authority Form** (more details later in the manual).

**THE CLIENTS BANK DETAILS MUST BE FILLED OUT BY THE CLIENT.** Even if they are a returning client and their bank details are already in our system they **MUST** rewrite their bank details on the form. This is to ensure if the incorrect bank details are used it is the Client's error and not ours.

**Get the Client to sign and date the form at the bottom.**

## CLIENT INFORMATION FORM

**Full Name:** First and Last name

**Residential Address:** Must provide (at minimum) either residential or postal address

**Postal Address:** Can write 'As Above'

**DOB:** Date of birth      **Tax File Number:** Client MUST provide TFN

**Email:** Must provide (at minimum) either email or phone for contact. Encourage both.

**Phone:** \_\_\_\_\_

Are you a Working Holiday Maker ("WHM") on a 417 or 462 VISA?     

Are you exempt from Medicare Levy?     

**INCOME:** (✓ Tick for YES)

Financial Year: Year of return (Eg: 2022)

Employment income:     

If yes: Number of PAYG Payment Summaries?      \_\_\_\_\_

Interest Income:     

If yes: How many bank accounts do you have that earn interest?      \_\_\_\_\_

Income from Centrelink (not including Family Tax Benefit):     

Do you own a rental property?       (from +\$66)

Did you receive any of the following?

- Dividends       (from +\$11)
- Sold shares, rental property, etc       (from +\$66)
- Crypto Trading (with CSV file)       (from +\$110)
- Foreign income       (from +\$33)
- Investment income       (from +\$33)      if yes: What income? \_\_\_\_\_
- Other income       (POA)      if yes: What income? \_\_\_\_\_

Business income (ABN Income):       (from +\$66)

- WHM – If on WHM visa (non-resident) > TICK
- Employment income – if Client was employed > TICK
- Number of PAYG Summaries = number of places of work > Record amount
  - Most will appear on Prefill but best to confirm with client. Especially important in July when STP is yet to be finalised.
- Interest income – if client has interest earned on bank account/s > TICK.
  - If an Australian account, it will appear on prefill. Especially important in July when STP is yet to be finalised.

- Centrelink income – if yes > TICK
  - Do NOT include Family Tax Benefit.
- Rental property – Income earned from a rental property > TICK
  - This does not include the Client's own residence, unless part of it is rented.
  - Client must OWN the property and is renting it out.
- Foreign income – if yes > TICK
  - Income earned overseas such as pensions, wages, business, etc.
- Investment income – if yes > TICK
  - Income such as managed funds, trust distributions, partnership distributions.
- Other investment income – if yes > TICK.
  - For all investment incomes, be sure client is aware of the PRICE INCREASE.
- Business Income – if yes > TICK.
  - If client has ABN showing on portal, be sure to confirm that they did not earn any income from business activities.

MAKE SURE YOU CHARGE CORRECTLY

-----

Private Health Insurance:

Dependent Children:

Do you have a partner/spouse to declare in your tax return?:

Bank Account Details:      Cash/EFT:       Fee From Refund:

Account holder name: \_\_\_\_\_

BSB: \_\_\_\_\_

Account Number: \_\_\_\_\_

Bank: \_\_\_\_\_

- PHI – insurance for person on student visa = No. Australian Health Fund > TICK
  - Information should appear on prefill. If not, client is to provide statement, which can be obtained online or from a provider's branch.
- Dependent Children – child under 21 or under 21 and studying full time earning under \$2,000, and client maintained their costs (living, food and medical expenses) > TICK & write number of children.
- Partner or spouse (includes defacto couples) – married or live with on a genuine

domestic basis as a couple – if yes > TICK

- Will also need spouse's: first name, last name, estimated taxable income and gender.
- Bank Account Details of client – where they want the refund transferred to.
  - Presumption that they will have a refund.
  - **Ensure Client writes the bank details legibly**
  - **Confirm details if you cannot read it.**

Client to print name, sign and date at the bottom.

I hereby confirm that the above information provided to Streamline CA Pty Ltd T/A Ezytax Blue is true and correct and that I alone am solely responsible for the above information. I understand that Streamline CA Pty Ltd T/A Ezytax Blue is a time based billing service and I am billed based on time. I acknowledge that my income tax return will be prepared based on the above information and that at no time is Streamline CA Pty Ltd T/A Ezytax Blue responsible for any errors or omissions. Further, I hereby confirm that the above bank details are the valid and correct details for my nominated financial institution. Finally, I consent to be added to Streamline CA Pty Ltd T/A Ezytax Blue's Tax Agent Portal.

Name: Client's Name

Signed: Client's Signature

Date: Today's Date

### **FOR EXISTING CLIENTS WHO REFUSE:**

Some clients will blatantly refuse to complete. Just get them to complete:

- 1) Name – Put their name
- 2) Address – Put “Per last year”
- 3) Income Section – get them to at least write the '**Financial Year**' and tick '**PAYG**'. If they are really bad, can skip.
- 4) Bank details – If they are adamant it does not change put “Per Last Year”
- 5) Name, Sign and Date – Client must still do this section.
- 6) **WARN** them that if the details were incorrect last year they may be incorrect this year.

