



Sangelictax Sangelictax

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“ Service with a Sangelic Touch ”

Sangelictax Client Checklist

This checklist is for new and existing clients who require their tax returns to be prepared.

Please fill in the relevant information where applicable and forward back to me

Relevant tax worksheets can be provided by me or can be found my website and downloaded

**** New Clients can you please provide copies of previous tax returns and financials and other attachments/schedules****

Type of Entity (please circle);

Trust

Company

Partnership

Sole Trader

Tax File Number:

Name of Entity (exact name as it appears on ATO correspondences :

Postal Address:

State:

Postcode:

Email Address:

Contact Number:

Date of Birth (if sole trader):

Business Activity Description:

The contents of this worksheet are confidential to the person it is addressed to please contact sender in the event it is not received by the intended person.



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Tax Requirements for Entities (please tick if applicable);

Trusts	Yes	No
Financial Reports		
Tax Returns		
Trustee Resolution		
Letter of Engagement to previous accountant		

Company	Yes	No
Financial Reports		
Tax Returns		
Letter of Engagement to previous accountant		

Partnership	Yes	No
Financial Reports		
Tax Returns		
Letter of Engagement to previous accountant		

Sole Trader	Yes	No
Financial Reports		
Tax Returns		
Letter of Engagement to previous accountant		

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Tax Requirements for Individuals (this also applies to Non-Salary Wages Earners)

Tax File Number:

Full Name (exact name as it appears on ATO correspondences :

Postal Address:

State:

Postcode:

Home Address: (if same as Postal write “as above”)

State:

Postcode:

Email Address:

Date of Birth:

Contact Number:

Occupation:

Marital Status:

****If married/de-facto please advise if your partner requires lodging a tax return to fill out this form as well****

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Tax Requirements for Individuals (this also applies to Non-Salary Wages Earners)

Individuals	Yes	No
Tax Return – Salary Wages with dedctns		
Tax Returns – Salary Wages with dedctns and Other Additional Income - Rental Properties - Sole Trader/Self Employment - Share Trading Activities - Foreign Income - Other		
Letter of Engagement to previous accountant		

Family Details re Trust Distributions	Date of Birth	Yes	No
Children Under 18			

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