CLIENT INFORMATION FORM

NAME						
ADDRESS						
TELEPHONE						
D.O.B		_/	/		TAX FILE NO	
SPOUSE NAME						
SPOUSE D.O.B		_/	/	SPOUS	SE TAX FILE NO	
YOUR OCCUPATIO						
EMPLOYERS ABN					PH NO. OF YOUR PAY MASTER	
POSTAL ADDRESS OF YOUR PAY MAS	TER					
GROSS SALARY PER PAY	\$				TAX DEDUCTED PER PAY \$	
PAY FREQUENCY		Weekly	/		tnightly	Monthly
ADDRESS OF YOUR INVESTMENT PROPERTY						
PURCHASE PRICE	\$					
FINANCIER						
SOLICITOR						
OWNERSHIP %	Name	1				
				%		%

INFORMATION REQUEST SCHEDULE

Please provide copies of the following documents.

- 1. Contract of Sale (page indicating contract date & purchase price)
- 2. Bank Letter of Offer (pages indicating amount of loan, interest rate & term)
- 3. Solicitor's correspondence (letter provided by Solicitor at settlement detailing all costs, fees and disbursements)
- 4. Quantity Surveyors Report
- 5. Two (2) recent pay slips showing year to date gross and year to date tax instalment deductions (if your pay slips do not show YTD figures please provide a letter from your employer showing last date paid, YTD taxable gross and YTD tax withheld)
- 6. Copy of last tax return lodged if completed by another accountant

