



**CLIENT MAIN CONTACT DETAILS**

Name/s: (Mr/Mrs/Miss/Ms) ..... Date: .....

Address: .....

Phone: Home: ..... Cell: .....

Work: ..... Permission given to call at work? Yes | No

Email: .....

**ENTITY, CLIENTS & IRD NUMBER DETAILS**

ENTITY TYPE (tick)	TITLE	FULL NAME/S – must match IRD records	IRD No
<input type="checkbox"/> Sole Trader:	(Mr/Mrs/Miss/Ms) .....	.....	.....
	(Mr/Mrs/Miss/Ms) .....	.....	.....
<input type="checkbox"/> Partnership:	(Mr/Mrs/Miss/Ms) .....	.....	.....
	(Mr/Mrs/Miss/Ms) .....	.....	.....
<input type="checkbox"/> Company:	.....	.....	.....
Shareholder/Director	(Mr/Mrs/Miss/Ms) .....	.....	.....
Shareholder/Director	(Mr/Mrs/Miss/Ms) .....	.....	.....
<input type="checkbox"/> Trust:	.....	.....	.....

**BUSINESS/ENTITY DETAILS**

Type of Business: ..... Time in Business: .....

(eg rental property, hair dresser, IT consultant, building contractor, sheep farmer etc) (eg 6 months, 10 years etc)

LTC? Yes | No Record-keeping: ..... By: .....

(eg XERO, MYOB, Manual, Spreadsheet, Banklink on/off site etc) (eg name of entity representative)

GST? Yes | No Basis: Invoice/Payments/Hybrid Frequency: 1 mthly | 2 mthly | 6 mthly Done by: Client | SBC

Employer? Yes | No No of Employees:..... Wages done by: ..... PAYE by: Client | SBC

**PREVIOUS ACCOUNTANT DETAILS**

“No professional reason letter” sent? Date: .....

Name ..... Firm .....

**HOW DID YOU HEAR ABOUT US?**

Referred by: .....

Website  Leader

Radio  Street Signage

Yellow Pages  Other: .....

