



smart business centre

IMPROVING LIVES THROUGH BUSINESS SUCCESS

CLIENT MAIN CONTACT DETAILS

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

Address:

Phone: Home: Cell:

Email:

ENTITY, CLIENTS & IRD NUMBER DETAILS

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

Contact Details

HOW DID YOU HEAR ABOUT US?

- Website
- Radio
- Yellow Pages
- Leader
- Street Signage
- Other:

Referred by:

