SUTTIE FINANCIAL GROUP
ACCOUNTING & TAXATION
HOME & COMMERCIAL LOANS

"We Listen, We Care, We Provide Solutions"

RICHARD E SUTTIE PTY LTD

Address: Ground Floor, 1G Marine Parade, ABBOTSFORD 3067 Postal: PO Box 376, ABBOTSFORD 3067
Phone No: 03 9417 3511 Email: enquiries@respl.com.au

DETAILS					
Title			**Tax File Number**		
Surname			**Date of Birth**		
First Name			**Work Telephone**	( )	
Other Name/s			**Mobile Telephone**		
Preferred Name			**Home Telephone**	( )	
Occupation (not Title)					
Residential Address			**Postal Address**		
Suburb			**Suburb**		
State		**Postcode**	**State**		**Postcode**
Country			Country		
E-mail Address			**Registered for MY GOV**	Yes / No	

How did you hear about us? ☐ **Website** ☐ **Friend/Family** ☐ **Internet** ☐ **Other** .....

Spouse (Full Name)	**Date of Birth**	**Tax File Number**	**Taxable Income**
Dependent Children (Full Name) under 25 years during year	**Date of Birth**	**Tax File Number**	**Taxable Income**

BANK ACCOUNT DETAILS	Acc. Name	BSB:	A/C No:

Are you a veteran? If so, then you will need to submit your *identification details* to our office for tax offset purposes.

ASSOCIATED ENTITIES:	Is the Entity **Closely Held**	YES / NO
Company Name/ and/or Trust Name:		
Directors/ and/or Trustee :		
Business Address:		

AUTHORITY / PRIVACY DECLARATION

***Please note:* We are unable to prepare income tax returns for clients who have not completed this authority.**

I hereby authorise Richard E Suttie Pty Ltd to act as my Tax Agent and prepare my income tax returns from the information that I have supplied and in accordance with my instructions. I also authorise the obtaining or verification of tax-related details from my financial advisor and/or my financial institutions should this be required for the purpose of preparing my income tax return.

Name: .....

Dated: ....

Signature of Taxpayer

OFFICE USE ONLY

MYOB: / / OUTLOOK : / / ASIC : / / ATO PORTAL: / /