

New Client Business Form	
Entity Type	Company Partnership Trust Sole Trader SMSF
Business Legal Name:	
Business Trading Name:	
1. Director Name:	Director ID:
2. Director Name:	Director ID:
3. Director Name:	Director ID:
DOB:	
ABN:	
TFN:	
ACN:	
Long Service Leave Workers Number:	
Description of business:	
Business Phone number:	
Business Email Address:	
Business Postal Address:	
Accounting software used?	
Will Woopi & Co Accounting be acting as your registered ASIC agent? (Extra Fee will be added)	*companies only
Is the business registered for GST?	
If so, will Woopi & Co Accounting be preparing your BAS?	
Is the company registered for PAYG Withholding (wages)?	
Number of employees, if any	
Will Woopi & Co Accounting be looking after your workers' compensation lodgments?	

Will Woopi & Co Accounting be looking after your payroll requirements? If so, when does the pay run period begin & what's the frequency of your payroll?	
Will Woopi & Co Accounting be looking after your superannuation guarantee for employees? If so, what super clearing house is used and whats the frequency?	
Will Woopi & Co Accounting be looking after your: - STP (Single Touch Payroll) - TPAR (Taxable payments annual report)	STP:
	TPAR:
Any additional comments for Woopi & Co Accounting/ your accountant?	

Business BANKING DETAILS:		ID Verification – Woopi & Co Accounting to complete	
Financial Institution:		Verified:	YES / NO
BSB No:		Date Verified:	
Account No:		Verification Method:	Doc In Person Online
Account Name:		Verified by:	
AUDIT INSURANCE – Consent to Supplying your contact details to AB Phillips to offer you			Audit Insurance YES / NO
TAX AGENT PORTAL AUTHORITY (Sole Trader use only)			
Client Name:			
I give permission for Woopi & Co Accounting to act on my behalf as my Tax Agent. I authorise Woopi & Co Accounting to add me to their Tax Agent Portal using my Full Name, DOB and Tax File Number.			

Client Signature: _____
 Date: ____/____/____
 Signature of Tax Agent _____

Thank you for taking the time to complete this form.