



Lockwood and Ward

TAXATION AND BUSINESS ADVISORS

New Client Form 2020

Welcome to Lockwood & Ward! Please fill in the form below and return the form to us by return email (or to admin@lockwood.com.au) or via fax on 02 9299 7877. Thank you for your assistance in allowing us to help you. We look forward to a long and happy business relationship.

Lockwood & Ward

Client Details			
Title		Mobile number	
First name		Home number	
Middle name		Work number	
Last name		Email address	
Date of birth		Occupation	
TFN		ABN	
Residency status		Other visa type please specify	
How did you hear about us? (If you were referred to us by a friend or family member please specify their name)			
Residential address			
Postal address			

Spouse / Partner Details			
Title		Middle name	
First name		Last name	DOB

Last Income Tax Return			
Year of last Income Tax Return		Prepared by	

Would you like to discuss any of the matters below with us? If YES please tick where applicable			
Tax planning and minimisation		Small business accounting	
Reduce mortgage debt		Investment property purchase	
Financial planning		Residential mortgage finance	
Insurance		Commercial finance	
Self managed superannuation fund		Business sales	
Retirement planning		Personal debt problems	
Starting a business		Salary packaging	