

New Client Form 2019

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? | | | |
| Residential address | | | |
| Postal address | | | |

| Spouse / Partner Details | | | | |
|--------------------------|---------------------------|-------------|--|-----|
| Title | Dr / Mr / Mrs / Ms / Miss | 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 | |