

Complete this form if you run your business as a Company, Partnership or Trust.

Thank you for choosing Omega Tax and Accounting to process your tax return. Before we start, we require your permission to access the ATO Tax Portal, as well as some pertinent information.

Please selecting your business structure * Company Partnership Trust

CONTACT DETAILS OF DIRECTOR / PARTNER / TRUSTEE

First Name *	
Last Name *	
Email *	
Phone *	+61

INFORMATION REQUIRED TO ACCESS THE ATO PORTAL

Tax File Number of Company / Partnership / Trust *	
Date of Incorporation / Trust Settlement *	

BUSINESS DETAILS

Company / Partnership / Trust Name *	
ABN *	
ACN *	
Industry *	
Other Directors / Partners / Trustees *	
Other Directors / Partners / Trustees *	
Other Directors / Partners / Trustees *	
Business Address * (No. Street Name, Suburb, Postcode, State, Country)	
GST Registered *	Yes <input type="checkbox"/> No <input type="checkbox"/>



BANKING DETAILS FOR REFUNDS (REQUIRED BY ATO)

Name of Account *	
Banking Institution e.g. NAB, CBA *	
BSB *	
Account Number *	

Other topics that might impact my tax return:

Provide us with the below forms, and any other details that might impact your tax return *

- Prior year Financials and Tax Return
- Certificate of Incorporation and constitution/Signed Trust Deed
- Copy of the ID of the Director/Trustee

PERMISSION

Permission to Access the Australian Tax Portal *

I hereby give permission for Omega Tax and Accounting to access the Australian Tax Office portal on my / entity's behalf and utilise the above-mentioned information in order to register me / entity as a client on their tax software.

I hereby give permission

Signature *

CANCELLATION ADMINISTRATIVE FEE

Should you complete the new client form and onboard as a new client and then choose to disengage or complete your tax return work yourself, an administration fee of \$100 ex GST will be charged.