

CU

Client
Update

2015

^AWR ^ABB

- A) Adding a client for **Income Tax** purposes? (Please complete: 1, 2 & 3) ^BFI
- B) Deleting a client for **Income Tax** purposes? (Please complete: 1, 2 & 3) ^BFJ
- C) Change of name for **Income Tax** purposes? (Please complete: 1, 2, & 5) ^BFG
- D) Change of address for **Income Tax** purposes? (Please complete: 1, 2 & 3) ^BFH
- E) Adding a client for **Activity Statement** purposes? (Please complete: 1, 2 & 4) ^FPE
- F) Deleting a client for **Activity Statement** purposes? (Please complete: 1, 2 & 4) ^FPH
- G) Are you modifying clients details for **Activity Statement** purposes? (Please complete: 1, 2 & 4) ^FPI
- H) Request to receive **Activity Statement** for this client via ELS? (Please complete: 1, 2 & 4) ^FPC
- I) Request to cease receiving **Activity Statement** for this client via ELS? (Please complete: 1, 2 & 4) ^FPD

Income Tax ONLY

- J) Taxpayer deceased (Please complete: 1 & 2) ^BFM
- K) Advise Further returns not necessary? (Please complete: 1, 2, M & N) ^BFL
- L) Advise Return not necessary for year? (Please complete: 1, 2, M & N) ^BFK

M) YEAR ^IJB _____

N) Reason ^BFY _____

1) Is the client an Individual?

^BFF

Individual	Y
Non-individual	N

2a) Individual Name

^ABE

^ABF

^ABG

^BAW

^BBB

2b) Sex code

^ABD

2c) Date of birth

^ABQ

2d) Non-individual Name

^AAU

^AAU

2e) ABN

^EBN

^ECY

2f) TFN

^AAD

^ATZ

3) Income Tax - Postal address for notices

^ABH

^ABH

^AME

^AMG

^AMF

^APE

4) Activity Statement - Postal address for notices

^IJC

^IJC

^IJD

^IJG

^IJE

^IJF

5) Previous Non-individual Name

^APP

^APP

Agent's phone

^BLI

^BLJ

Client's reference

^AWB

Contact name

^ACR

Agent's reference no

^AAE

(for this transaction)

Agent's signature

.....

Date

..../..../.....

Taxpayer's signature

.....

Date

..../..../.....

----- SENSITIVE-when completed -----

***** NOTE *****

THIS FORM CANNOT BE LODGED WITH THE ATO AS A PAPER REPRESENTATION OF THE FORM.

FOR PAPER LODGEMENT PLEASE USE THE PRE PRINTED FORMAT ISSUED BY THE ATO.
