

CLIENT PACK / 01

New client enquiry

A starting form to discuss your needs. Complete on your device or print and write in the fields.

Your name

Email

Phone (optional)

Service you would like help with

Financial year or reporting period

Business or fund name (if applicable)

Anything else to discuss? Please leave out sensitive identifiers.

This is an enquiry, not a tax lodgement authority. Please do not enter TFNs, passwords, bank account details or identity document numbers. We will arrange detailed records directly.

CLIENT PACK / 02

Existing client update

Use this form to request work or tell us about a change relevant to your tax or business.

Your name

Current email

Current phone

Work requested / service

Reporting period and any deadline to discuss

Business or fund name (if applicable)

What has changed? Income, contact details, business, property or ATO notices.

Tell us promptly about changes and notices. Send detailed documents only using the method agreed with Bereket.
Keep your original records and review any drafts before approval.

CLIENT PACK / 03

Tax return discussion form

Identify the topics relevant to your return. Bereket will confirm the records and further details required.

Your name

Email

Financial year

Topics to discuss

- | | |
|---|--|
| ☐ Employment income | ☐ ABN / sole trader income |
| ☐ Uber / rideshare / delivery | ☐ Rental income |
| ☐ Interest / dividends / managed funds | ☐ Shares / crypto / property sold |
| ☐ Foreign income / residency changes | ☐ Work expenses / self-education |
| ☐ Working from home / vehicle use | ☐ Other income / deductions / offsets |

Notes or questions (please leave out sensitive identifiers)

Prepare income and supporting expense records. Listing an expense here does not establish a deduction. Your return is reviewed and approved separately before any lodgement.

CLIENT PACK / 04

Business registration enquiry

Discuss your proposed structure, activity, registrations and costs before applications are made.

Your name

Email

Phone (optional)

Proposed business name

Main business activity

Structure to discuss (or write: need advice)

Expected start date / month

Registrations to discuss

☐ ABN

☐ GST registration

☐ TFN application

☐ Business name / company setup

Questions / existing arrangements

This is an initial enquiry, not a government application. Structure, eligibility, director and identity details, consents and any government fees are confirmed before proceeding.

Personal & rental records

Gather the records relevant to you. This list is a starting point and will be tailored to your circumstances.

Individual tax return

- ☐ Income statements, payment summaries and other income records.
- ☐ Interest, dividend and managed fund annual tax statements.
- ☐ Receipts and records for expenses you would like reviewed.
- ☐ Vehicle, travel, working from home and self-education records, if relevant.
- ☐ Private health insurance and personal super contribution records, if relevant.
- ☐ Previous return and relevant ATO notices.

Rental property and investment transactions

- ☐ Property agent annual statements and rent received directly.
- ☐ Loan interest, rates, insurance and supporting expense invoices.
- ☐ Repairs, improvements and depreciation schedules, if available.
- ☐ Ownership details, rental dates and any private-use periods.
- ☐ Purchase and sale contracts, settlement statements and transaction costs.
- ☐ Share, managed fund or crypto transaction history, if applicable.

A listed expense is not automatically deductible. Keep records of purchase costs and asset transactions; Bereket will discuss the treatment based on your circumstances.

Business & rideshare records

Have the reporting period ready and gather the records that support the work you need.

Business tax, BAS and bookkeeping

- ☐ Accounting records and the relevant reporting period.
- ☐ Bank and credit card statements and reconciliations.
- ☐ Sales, purchases and supporting tax invoices.
- ☐ Payroll, PAYG withholding and super payment reports.
- ☐ Asset purchases and disposals, loans and finance statements.
- ☐ Previous BAS, tax returns and financial statements, if available.

Uber and rideshare drivers

- ☐ Income summaries for every platform: fares, tips, bonuses and other receipts.
- ☐ Platform fee and commission statements.
- ☐ Vehicle, fuel, insurance, maintenance and other business expense records.
- ☐ Logbook, kilometre and business-use records, where applicable.
- ☐ GST registration details and previous BAS.
- ☐ Explain any separate delivery-only activity when discussing your work.

Retain the supporting records behind platform summaries and bookkeeping totals. Contact Bereket to confirm the documents and accounting access needed for your reporting period.

CLIENT PACK / 07

SMSF & business setup records

Keep detailed fund and owner information ready until we agree how to provide it.

SMSF accounting and tax

- ☐ Fund bank accounts and investment statements.
- ☐ Dividend, distribution and annual tax statements.
- ☐ Contributions, rollovers, benefit and pension payment records.
- ☐ Property, loan and fund expense documents, if applicable.
- ☐ Prior financial statements, tax returns and auditor reports.
- ☐ Changes to trustees, members, deeds or fund arrangements.

Business registrations

- ☐ Description of your proposed business activity.
- ☐ Proposed business name and expected start date.
- ☐ Structure and registration questions to discuss.
- ☐ Existing entity details, if relevant, to provide directly.
- ☐ Any existing adviser, company or trust documents to discuss.
- ☐ Detailed owner, director and identity information is arranged separately.

SMSF services here are accounting and tax preparation. Independent audit and any specialist financial or legal work require separate arrangements with the appropriate professional.

Important client information

Read this alongside your tailored engagement letter and the current official TPB information.

Practice and registration

Bereket Abebaw trading as BK Tax & Business Services. ABN 73 848 710 313. Registered Tax Agent No. 26383182. Based in Truganina, Victoria. Search the TPB register for Bereket Abebaw or 26383182 to check current registration details.

Before work begins

We confirm scope, fees, responsibilities and the records needed in an engagement letter. Relevant practitioner disclosures and any registration conditions affecting the work are discussed directly. Draft returns and statements are reviewed and approved before lodgement.

Working together

We act honestly, take reasonable care, manage conflicts and protect confidentiality when providing the agreed services. Please give complete and accurate information, keep supporting records, report changes and notices promptly, and review drafts carefully.

Concerns and complaints

Contact Bereket on 0466 893 779 or info@bktaxandbusinessservice.com.au. You may also make a written complaint through the TPB online complaints process. The TPB website explains the process and links to its complaint form.

Your information

These forms are for initial enquiries. Keep TFNs, passwords, bank account details and identity documents out of them. Detailed tax records, permissions and identity checks are arranged directly. Contact Bereket to ask about your information or request a correction.

Official resources

TPB register: <https://www.tpb.gov.au/public-register>

TPB client information: <https://www.tpb.gov.au/keeping-your-clients-informed>

TPB complaints: <https://www.tpb.gov.au/complaints>

ATO: <https://www.ato.gov.au/>