



# Client Update

**NOT FOR PAPER  
LODGEMENT**

### INCOME TAX

- A Adding a client for Income Tax purposes? (Complete: 1, 2 & 3) Print Y for yes or N for no  Y
- B Deleting a client for Income Tax purposes? (Complete: 1, 2 & 3) Print Y for yes or N for no  N
- C Change of name for Income Tax purposes? (Complete: 1, 2 & 5) Print Y for yes or N for no  N
- D Change of address for Income Tax purposes? (Complete: 1, 2 & 3) Print Y for yes or N for no  Y

### ACTIVITY STATEMENTS

- E Adding a client for Activity Statement purposes? (Please complete: 1, 2 & 4) Print Y for yes or N for no
- F Deleting a client for Activity Statement purposes? (Please complete: 1, 2 & 4) Print Y for yes or N for no
- G Are you modifying an existing clients details for Activity Statement purposes? (Please complete: 1, 2 & 4) Print Y for yes or N for no
- H Request to receive Activity Statement for this client via ELS? (Please complete: 1, 2 & 4) Print Y for yes or N for no
- I Request to cease receiving Activity Statement for this client via ELS? (Please complete: 1, 2 & 4) Print Y for yes or N for no

### Income Tax ONLY

- J Taxpayer deceased? (Please complete: 1 & 2) Print Y for yes or N for no  N
- K Advise further returns not necessary? (Please complete: 1, 2, 5, M & N) Print Y for yes or N for no  N
- L Advise return not necessary for year? (Please complete: 1, 2, 5, M & N) Print Y for yes or N for no  N
- M Further returns not necessary / Return not necessary year
- N Reason

1 Is the client an Individual? Print Y for yes or N for no  N

2a Individual name

2b Sex code

2c Date of birth

2d Non-individual name

2e ABN

2f TFN

**3 Income Tax**

Postal address for notices

C/- Tranzact Super
GPO Box 849
Brisbane Old 4001

**4 Activity Statement**

Postal address for notices

C/- Tranzact Super
GPO Box 849
Brisbane Qld 4001

**5a** Previous Individual Surname

Not Applicable
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**5b** Previous Non-Individual Name

Not Applicable
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Agent's phone

07 3854 4444
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Client's reference

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Contact name

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Agent's reference no

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Agent's  
signature

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Date

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Taxpayer's  
signature

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Date

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