



KonceptM

CLIENT DETAILS & AUTHORISATION FORM	
Surname	
First & Given Names	
Personal Tax File Number:	
Date of Birth:	
Mobile number:	
Home address:	
Email Address:	
DECLARATION: I declare that I authorize KonceptM (Tax Agent Number: 25 951 286) to access my tax information by adding me to their tax agent portal. I will provide KonceptM with a primary photographic identification document (Drivers licence) as required by the Australian Taxation office. Signature: Date: Other: If you would like KonceptM to provide you with a complimentary update on your tax lodgments, planning or finance, please tick the most appropriate option below and the information will be sent to you via the email address provided: <input type="radio"/> Complimentary financial health check <input type="radio"/> Complimentary tax planning around my income <input type="radio"/> Complimentary mortgage interest rate check <input type="radio"/> Complimentary borrowing capacity check	

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