



New Company Onboarding Form

Name

First Name

Last Name

Email

Phone Number

Company Name

Company ABN

Company TFN

Company Address

Street Address

City

State / Province

Postal / Zip Code

Please briefly explain what your company does

Starting date of your company

Your job title

Number of employees including you

How many directors

GST basis

On a cash basis

Accural

What software do you use for bookkeeping

Xero

MYOB

What software do you use for payroll

Xero

MYOB

Payroller

Are you up todate with STP

What bank is your main business account with?

What credit card is your main business account with?

ASIC corporate key

ACN

Do you want us to be your registered office?

Yes

No

Which email we will use to communicate with you

Do you have any experience to work with a bookkeeping service before?

Yes

No

Please select the services you want us to provide

Financial Statements

Year End Tax Package

Monthly Account
Reconciliation

Transaction Entry

Payroll

Business Consulting

Bill Pay

Please give details about to service(s) you want from us

Additional information we should know