



KLINKERT LAW

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Client Information Form

Title and Full Name	[Click or tap here to enter text.]	Date of Birth	[Click or tap here to enter text.]
Occupation	[Click or tap here to enter text.]	Employer	[Click or tap here to enter text.]
Home Phone	[Click or tap here to enter text.]	Mobile Phone	[Click or tap here to enter text.]
Email Address 1	[Click or tap here to enter text.]	Email Address 2	[Click or tap here to enter text.]
Physical Address	[Click or tap here to enter text.]	Postal Address	[Click or tap here to enter text.]
IRD Number	[Click or tap here to enter text.]	Photo ID Type	[Click or tap here to enter text.]
Preferred Method of Contact	[Click or tap here to enter text.]	Preferred Method of written Communication	[Click or tap here to enter text.]
Emergency Contact Name, Address and Phone	[Click or tap here to enter text. Click or tap here to enter text. Click or tap here to enter text.]	Other information you may wish to provide	[Click or tap here to enter text.]

Your Legal Affairs

Please advise if you have the following and provide further basic details if possible. This could include names of Executors of your Will, Trustees of your Trust, Attorneys for [Enduring] Powers of Attorney; Company and Trust IRD Numbers etc.

Will	[Click or tap here to enter text.]
Powers of Attorney (Enduring or General)	[Click or tap here to enter text.]
Family Trust	[Click or tap here to enter text.]
Company	[Click or tap here to enter text.]
Directorship, shareholding or trusteeship in any entity other than listed above	[Click or tap here to enter text.]
Tax Residencies other than NZ including TFN	[Click or tap here to enter text.]
IRD / GST Numbers of above entities	[Click or tap here to enter text.]

Klinkert Law

What has brought you to Klinkert Law?	[Click or tap here to enter text.]
What is it that you wish to achieve?	[Click or tap here to enter text.]

WE HAVE, OR WILL PROVIDE YOU WITH THE FOLLOWING

Completed and Signed Letter of Engagement
Standard Terms and Conditions
Information for Clients

Our Requirements

(for compliance Anti-Money Laundering Legislation and Law Society Rules)

Current Photographic ID:	To sight your original Passport or Driver/Firearms Licence. If you do not have any of these, please discuss your options with us	Proof of Address	To sight two originals of, for example: Utility Account, Rates Demand; Bank Statement; IRD or other governmental correspondence etc. We will accept screen shots of this information.
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