



**KLINKERT LAW**

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## Client Information Form

FULL NAME:			
PHYSICAL ADDRESS: Please bring proof of this with you			
POSTAL ADDRESS: Please bring proof of this with you			
DATE OF BIRTH:		PHOTO ID TYPE: Please bring with you	
CONTACT PHONE NOS:		MOBILE PHONE NO.	
CONTACT EMAIL:		PREFERRED (Email or Telephone)	
IRD NO.		OCCUPATION:	
NAME OF OTHER PARTY (FOR CONFLICT CHECK)			
WHAT NATIONALITY AND/OR CITIZENSHIPS DO YOU HOLD?			
WHICH COUNTRIES ARE YOU A REGISTERED TAX PAYER?			
WHAT RESIDENCY PERMITS DO YOU HOLD?			
WHAT ARE YOUR OVERSEAS TAX NUMBERS (if any)?:			
WHAT IS YOUR SOURCE OF FUNDS/WEALTH (FOR PURCHASE)?			
ARE YOU A POLITICALLY EXPOSED PERSON?			
DO YOU HAVE A CURRENT WILL		NAME OF YOUR ATTORNEY	
DO YOU HAVE A FAMILY TRUST		NAME OF TRUST	
ARE YOU A DIRECTOR AND/OR SHAREHOLDER OF A COMPANY		COMPANY NAME	
COMPANY IRD / GST NO.		NAME OF YOUR ACCOUNTANT	
FULL NAME OF NEXT OF KIN / EMERGENCY CONTACT:			
CONTACT DETAILS OF NEXT OF KIN / EMERGENCY CONTACT:			
WHAT HAS BROUGHT YOU TO KLINKERT LAW?			
WHAT DO YOU HOPE TO ACHIEVE?			
PLEASE SIGN AND DATE THIS FORM			
YOU SHOULD HAVE RECEIVED THE FOLLOWING FOR YOUR RECORDS (please alert us if you have not)		<ul style="list-style-type: none"> <li>&gt; Information for Clients</li> <li>&gt; Standard Terms of Engagement</li> </ul>	
YOU SHOULD HAVE COMPLETED, SIGNED & RETURNED THE FOLLOWING TO KLINKERT LAW AT YOUR FIRST APPOINTMENT		<ul style="list-style-type: none"> <li>&gt; Completed &amp; Signed Letter of Engagement</li> <li>Have your current photo id with you</li> <li>Have proof of your current address with you</li> <li>Have a bank statement available for the account to receive funds into</li> </ul>	