**Please complete this form.**

Please note, at the VOI interview we will take your photo.

\*Have a digital camera available for use in the office.

|  |  |  |
| --- | --- | --- |
| **Your personal and contact details** | | |
| First name: Middle name: | | |
| Last name: | | |
| Also known as:  \*It is not uncommon for someone to use a nick name and/or a shortened version of their name. As this name does not match up with the identity documents it is recommended that the client provide a simple declaration as to their name. | | |
| Date of birth: Place of birth: | | |
| Home address: | | |
| Postal address if different: | | |
| Telephone: Email: | | |
| Website: | | |
| Tax file number:  \*Banks require this to invest funds on behalf of a client | ABN:  \*Check the ABN – <http://abr.business.gov.au/>  The ABN may disclose a trust. | |
| **Tick a box to select your preferred method of contact with us**  \*Some clients prefer to communicate a certain way because this is the best way they take in information. Even where a preferred method is selected remember it is important to keep good contemporaneous file note and confirm advice / instructions in writing. | | |
|  Email | |  Face to face |
|  Telephone | |  Post |
|  Specify other: | | |

|  |  |
| --- | --- |
| **Current employer details**  \*You can contact the employer where the client cannot be contacted. They may be at work at the time you need to contact them. | |
| Name: | |
| Address: | Telephone: |
| Email: | Website: |

You authorise us to contact your employer in the event of an emergency or where you are uncontactable.

|  |
| --- |
| **Your specimen signature** – please use a black pen |
| \*Compare this to the signature on the photo identity documents and any power of attorney and documents which you witness for the client. |

|  |  |
| --- | --- |
| **Please complete if instructing us in your capacity as a director of a company** | |
| Company name: | Company address: |
| Company ABN:  \*Check the ABN – <http://abr.business.gov.au/> The ABN may disclose a trust. | Company telephone: |
| Number of directors: | |

|  |
| --- |
| **Please complete if instructing us in your capacity as an attorney**  \*Note below the requirement for the client to bring the original or a certified copy of the power of attorney to the meeting. |
| Donor name: |
| Donor address: |
| Donor contact number: |
| Relationship to donor: |

|  |
| --- |
| **Closest relative or spouse / de facto / domestic partner details** |
| First name: |
| Last name: |
| Address: |
| Telephone: |
| Email: |
| Relationship: |
| You authorise us to contact this person in the event of an emergency or where you are uncontactable. |

**What to bring to our office for your VOI interview**

* Completed VOI client information sheet. \*Retain on file.
* Marriage or change of name certificate where the name on your identity documents has changed. \*Retain a certified copy.
* Original power of attorney if instructing us as an attorney. \*Retain a certified copy.
* The original documents listed in category 1 must be provided. If those documents are not available move to the next category down the list until you have all of the listed documents. \*Retain a certified copy. The list below is from the [ARNECC Model Participation Rules](https://www.arnecc.gov.au/publications/model_participation_rules).

**For Australian citizens and residents**

**Category 1:** An Australian or Foreign Passport

* plus either an Australian driver’s licence or Australian Government-issued card with photo evidencing age and/or identity

**Category 2:** An Australian or Foreign Passport

* plus a full birth certificate, citizenship certificate or descent certificate
* plus a Medicare, Centrelink or Department of Veterans’ Affairs card.

**Category 3:** An Australian driver’s licence or Australian Government-issued card with photo evidencing age and/or identity

\*A proof of age card is an example of an Australian Government-issued card.

* plus a full birth certificate, citizenship certificate or descent certificate
* plus a Medicare, Centrelink or Department of Veterans’ Affairs card.

**Category 4a:** An Australian or Foreign Passport

* plus another form of Australian or Foreign Government issued photographic identity document

**Category 4b:** An Australian or Foreign Passport

* plus a full birth certificate
* plus another form of Australian or Foreign Government issued identity document

**Category 5a:** An Identifier Declaration\*

* plus a full birth certificate, citizenship certificate or descent certificate
* plus a Medicare, Centrelink or Department of Veterans’ Affairs card.

**Category 5b:** An Identifier Declaration\* from a specified class of person

* plus a Medicare, Centrelink or Department of Veterans’ Affairs card.

**For non-Australian citizens and residents**

**Category 6a:** A Foreign Passport

* plus another form of Australian or Foreign Government issued photographic identity document

**Category 6b:**  A Foreign Passport

* plus full birth certificate
* plus another form of Australian or Foreign Government issued identity document

\*The process for completing an Identification Document and the document itself is contained in schedule 8 and 9 of the ARNECC Model Participation Rules.