



Adelaide Tax Professionals

Easy Tax Solutions

Your Details

Title: Miss <input type="checkbox"/> Mrs <input type="checkbox"/> Ms <input type="checkbox"/> Mr <input type="checkbox"/>
First name:
Surname name:
Date of birth:
Gender: Male <input type="checkbox"/> Female <input type="checkbox"/>
Occupation:
TFN:
ABN:
Visa Status (if applicable):

Spouse and Dependent Details

Spouse first name (if applicable):
Spouse last name (if applicable):
Spouse date of birth (if applicable):
Spouse income (if applicable):
No. of dependents: <input type="text"/>

Your Contact Details

Email Address:	Contact number:	
Residential Address:		
Suburb:	Postcode:	State:
Postal Address (if different from above):		
Suburb:	Postcode:	State:

Other Services you may be interested: (Please tick your answers)

Do you currently have a mortgage or a car loan?	Yes <input type="checkbox"/>	No <input type="checkbox"/>
Are you considering refinancing your debts to obtain a better interest rate?	Yes <input type="checkbox"/>	No <input type="checkbox"/>
Would you want to consolidate your debts?	Yes <input type="checkbox"/>	No <input type="checkbox"/>
Are you in the market to purchase a house or commercial property?	Yes <input type="checkbox"/>	No <input type="checkbox"/>
Are you considering financing a personal/business car?	Yes <input type="checkbox"/>	No <input type="checkbox"/>
Do you have your income protected in the event of a sickness or injury?	Yes <input type="checkbox"/>	No <input type="checkbox"/>
Do you have life insurance in place?	Yes <input type="checkbox"/>	No <input type="checkbox"/>
Do you wish to review your current investments including superannuation?	Yes <input type="checkbox"/>	No <input type="checkbox"/>
Do you want to consolidate/review your superannuation?	Yes <input type="checkbox"/>	No <input type="checkbox"/>



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Terms of Engagement

We are pleased to accept appointment as your *Accountant/Tax Agent*. We will act in your best interest at all times and provide the highest level of professional service. This document sets out the terms of the engagement. Any additions will be by the written agreement of both parties.

As your *Accountant/Tax Agent* We will:

- a) Register you with the ATO as a client of our firm
- b) analyse, discuss and prepare recommendations regarding your accounting records and financial affairs;
- c) prepare and lodge taxation returns, review assessments and advise on appeal procedures where necessary; and.
- d) undertake other work as agreed.

You are reminded that:

- a) performance of tasks is limited exclusively to those set out in this engagement letter;
- b) we do not (unless otherwise engaged to do so) undertake an audit or review, and as such no assurance will be expressed; and
- c) unless *we are* otherwise engaged to do so, this engagement cannot be relied upon to detect or otherwise disclose irregularities (such as fraud, illegalities or the errors of other parties).

Professional Fees and Payments

The professional fees for the services provided will be based on the time and skill required to complete the nominated tasks and will include as an additional item out of pocket expenses and statutory charges, unless otherwise agreed.

Our promotional \$59.95 “basic tax return” offer, is only available for PAYG individuals only. This offer includes up to 2 deductions per individual tax return. Any additional deduction will be subject to a \$5 fee. This excludes expenses such as motor vehicle, education, rental properties as well as sole traders. Fees are outline below:

Preparation of tax return and lodgement to ATO	
Individual PAYG (inclusive of <u>two</u> deductions)	\$59.95 (\$5 per additional deduction)
Individual PAYG with a rental property (no limit on deductions)	\$99.95 plus \$55 per additional rental property
Sole trader and other advice required (professional accountancy work)	\$150 per hour
Additional items:	
Motor vehicle expenses (logbook)	\$55
Capital gains - property	From \$110
Capital gains – shares	From \$25

We will prepare your taxation return based on the prompt supply of all information, were information is not provided and further information is required additional fees may be payable. If we uncover any anomalies which were not reasonably evident to us or were not advised before this engagement additional fee may be charged.



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Estimates

Fees are reasonable estimates and costs may vary from time to time due to unforeseeable problems and delays, the cooperation of third persons and deficiencies in documentation. If costs are likely to be significantly higher than originally estimated, you will be informed in writing of the changes and reasons.

Terms of Payment

A full account of professional fees, costs and disbursements will be provided. Unless otherwise agreed, terms are strictly 14 days from the date of invoice. Should the account be unpaid by the due date, I/we reserve the right to use a debt collection agency or other legal means to recover outstanding fees.

Disclosure of other fees and commissions

We will disclose to clients any commissions or other fees received as a result of work undertaken and will fully comply with statutory requirements in relation to the disclosure of this information.

Documents

Before documentation is lodged on your behalf, drafts will be forwarded for your approval. Documentation will be lodged with the relevant departments by the due dates, provided all information and documentation is received promptly after the Financial Year End or other statutory date. This will allow adequate time for preparation and lodgement.

If you are late in providing information, best efforts will be made to meet deadlines. No responsibility will be accepted for any late lodgement penalties incurred.

Standards

We adhere to Accounting and Auditing Standards, requirements to undertake Continued Professional Education. We are also obliged to hold current Professional Indemnity insurance.

Privacy Statement

We are bound by the provisions of the Privacy Act to maintain all your records securely and in accordance with the provisions of that Act. Any breach of these requirements should be notified to the Privacy Commissioner. As noted above under "Quality Review", your file, unless you specifically forbid it, may be subject to a Quality Review. As a Tax Agent we are subject to the code of professional conduct established by the *Tax Agent Services Act 2009* (TASA), this code requires that unless legally required too we cannot disclose information to a third party without your permission.

Income Tax Returns

We have been engaged to prepare and lodge income Tax Returns.

In addition to the basic financial information required to complete these Tax Returns, it is a requirement that taxpayers are able to substantiate their claims and it is expected that all source documentation will be available to allow analysis of the income tax implications of any transaction.

The fee for this service does not cover inquiries or investigations conducted by the Australian Taxation Office.

Client's disclosure and record keeping obligations

You are required by law to keep full and accurate records relating of your tax affairs. It is your obligation to provide us with all information that would be reasonably expected will be necessary to allow us to perform work contemplated under the engagement within a timely manner or as requested. This includes providing accurate and complete responses to questions asked of client by the practitioner. Inaccurate, incomplete or late information could have a material effect on services and/or conclusions.



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We need not verify the underlying accuracy or completeness of information from you if it appears reasonable. However, if we believe information is missing, incorrect or misleading, we will need to seek further assurance from you.

The *Taxation Administration Act 1953* now contains specific provisions that may provide you with “safe harbour” from administrative penalties for incorrect or late lodgement of returns. These safe harbour provisions will only be available to you if, amongst other things, you provide “all relevant taxation information” to us in a timely manner (the safe harbour provisions apply from 1 March 2010). Accordingly, it is to your advantage that all relevant information is disclosed to us, as any failure by you to provide this information may affect your ability to rely on the “safe harbour” provisions and will be taken into account in determining the extent to which tax practitioners have discharged their obligations to clients. It is your responsibility to show that you have brought all matters to our attention if you want to take advantage of the safe harbours created under new regime.

Client’s rights and obligations under the taxation laws

Taxpayers have certain rights under the taxation laws, including the right to seek a private ruling from the Australian Taxation Office (ATO) or to appeal or object against a decision made by the Commissioner. Taxpayers also have certain obligations under Australian taxation laws, such as the obligation to keep proper records and the obligation to lodge returns by the due date. We must keep you informed of any specific rights and obligations that may arise under Australian taxation laws.

Tax Practitioners obligation to comply with the law

We have a duty to act in our client’s best interests. However, the duty to act in our client’s best interests is subject to an overriding obligation to comply with the law, even if that may require us to act in a manner that may be contrary to your directions. For example, we could not lodge an income tax return that we believe to be false in a material respect.

Please sign and return the confirmation of acceptance of this engagement letter and return via the following methods:

Mail: Adelaide Tax Professionals

PO BOX 374

Stepney SA 5069

Email: admin@adelaide-taxpro.com.au

If you fail to return a signed acceptance but continue to use *our* services this will be taken as acceptance of the terms of this engagement letter.

Thank you for the opportunity to provide professional taxation services.

We look forward to developing a close and mutually satisfying relationship with you for many years to come.



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Acknowledgement and Confirmation

I, _____ confirm that I have been advised by Adelaide tax professionals as to the following requirements:

1. Have read and agree to the terms of engagement outline above.
2. I have disclosed to you all the income which I have earned and this has been declared in the return.
3. To have on hand any deductions noted via original receipts. Suppliers address, ABN, date of transaction as well as the type of good/serviced purchase. All deduction claims and rebates which have been noted in my tax return are based on my specific instructions. If no receipts are provided at the meeting or via email, I understand I am legally obligated to provide any written evidence in the event of an audit. I am aware The Australian taxation Office may apply penalties in the event of incorrect information.
4. I have been advised by Adelaide tax professionals to keep the written evidence and receipts for at least 5 years.
5. I have been advised that I must kept appropriate apportionment documents to verify my business usage claim.
6. I have been advised that there could be legal consequences and penalties if the information I have provided is incomplete or incorrect.
7. I have instructed Adelaide tax professionals to prepare a tax return based on my specific instructions.
8. I have read and understood the return prepared for me and will inform Adelaide tax professionals of any errors or missed information provided.

CLIENT NAME: _____

CLIENT SIGNATURE: _____

DATE: