Tax Agent Appointment Form

AT Partners Accountants & Business Advisors Pty Ltd
ABN 63 990 253 296 Tax Agent Number: 06109005
Address: Suite 2, 29 Princes Hwy Dandenong VIC 3175
Phone: (03) 9794 7058
Fax: (03) 9015 8474
E-mail: admin@atpartners.com.au
Website: www.atpartners.com.au

1. Are you a New Client or Current Client?

☐ New Client

☐ Current Client

2. Entity Details

Entity Type ☐ Individual (including Sole Trader)

☐ Non-Individual (Company, Partnership, SMSF, Trust)

Individual / Entity Name

Trading Name (if any)

Authorised Person Name
(e.g. Director / Partner / Trustee)

Tax File Number

ABN (if any)

Date of Birth / Date of Registration

Sex ☐ Male ☐ Female

Address

Suburb

State Post Code

Contact Number

E-mail Address

3. EFT Details (for tax refund, if available)

Account Name

BSB

Account Number

4. Other Interested Services

☐ Bookkeeping

☐ Loan

☐ Business Consulting

☐ Business Registration

5. Privacy Statement

Under the Privacy Act, you have a right to access personal information that AT Partners collect upon request. The information that AT Partners is collecting is for the purpose of providing taxation, accounting and other related advice. AT Partners may also use it to send you information:

1. to send newsletters concerning various financial matters which AT Partners believe would be of interest to you;
2. to invite you to seminars or events; and
3. to inform you of developments at the agent and other services that AT Partners can provide.

This information may be disclosed to the following organisations, Australian Taxation Office, AT Partners's solicitors; related companies or affiliate practices which may receive information of this kind; or to any other organisations to which we usually disclose information of this kind.

6. Declaration & Consent

- I / We hereby appoint and authorise AT Partners Accountants & Business Advisory Pty Ltd, trading as AT Partners ("the agent"), to act as my / our tax agent, and to lodge my / our tax return(s) electronically or otherwise. I / We have willingly supplied my Tax File Numbers. I / We acknowledge that once my / our return(s) is lodged the subsequent time taken is in no way the responsibility of the agent. I / We further authorise the agent to deal with or discuss any child support matters with any appropriate authority, which may effect my probable tax consequences.
- I / We declare that all information in the Individual, Partnership, Trust, Company, Superannuation Fund or Amended Taxation return is true and correct, and any error in supplying information is solely mine.
- I / We declare that all income received in accordance with the requirements of the Australian Taxation Office (ATO). This includes income received from an employer, Centrelink, business, capital gains, interest, dividends, rental receipts and any share of income from joint investments. All interest received including from Savings Banks, Fixed Deposits, Credit Unions, Building Societies and Personal Loans has been included in the Taxation Return even if tax has already been deducted. All company dividends received and any distributions from Managed Fund/Trusts is included. I / We confirm that any Award Transport Allowance received has been included as income and any deduction in regard to this complies with S8(1) of the Tax Act. For any tax offset claim I / We have provided relevant documents and for any Family Tax Benefit claim I / We have provided all details of my dependants and their income.
- I / We declare that I / We have available all the necessary receipts and other documentary evidence to substantiate all deductions claimed in the Taxation Return and can make them available if required by the ATO. I / We understand what constitutes a receipt and the requirements to retain documentary evidence for 5 years.
- I / We acknowledge it is possible that the taxation advice received from the agent may also constitute “financial product advice” within the meaning of that term in Chapter 7 of the Corporations Act 2001. The agent has advised me / us that the agent is not licensed to provide financial product advice and tax is only one of the matters that must be considered when making a decision on a financial product. The agent has advised that I / We should consider taking advice from the holder of an Australian Financial Services License before making a decision on a financial product. The fact the agent is required under the Corporations Act to provide this warning does not in any way affect the agent’s ability to provide taxation advice and in particular, the specific tax advice that may have been received in any tax matters and all other related matters.
- I / We acknowledge the option to accept the agent’s assistance with taxation audits with the express understanding that assistance is only available if the agent is contracted when audit is first notified. I / We further acknowledge that any non-tax service, financial products or related services that may be used are accepted by myself / ourselves independently and is done so at my / our sole discretion and without any recourse to the agent.
- I / We acknowledge that I / We have read the above privacy statement and consent to the uses and disclosures listed therein and to other uses and disclosures allowed under the Act. I / We also consent to the transfer of my / our information, including personal information and tax file number(s), to another organisation on the sale, transfer or disposal of the agent's business.

7. Client Signatories

Signature	Signature
Name	Name
Position (if Non-Individual)	Position (if Non-Individual)
Date	Date

For any enquires, please contact us on (03) 9794 7058, by mail at Suite 2, 29 Princes Hwy Dandenong VIC 3175 or by e-mail at admin@atpartners.com.au

Return this form by either:
- Forward it to our friendly team member
- e-mail to: admin@atpartners.com.au
- post to: Po Box 815 Endeavour Hills VIC 3802