

New Client Registration form - Individual

Title : Mr Mrs Ms Other

First Name: **Last Name:**

Date Of Birth : **TFN:**

Phone: **ABN:**

VISA Status:

Email:

Address:

Suburb Post Code State
.....

Bank Details:

BSB.: **A/C No:**

Spouse Details:

First Name: **Last Name:**

DOB:

Re: Professional Services Engagement Letter for the Financial Year Ending 30 June 20__

Our Engagement:

- I..... confirm that I have been advised by you as to the requirement to demonstrate that an expense has been incurred for deductible purposes, together with satisfying the Substantiation legislation in relation to work, car and business travel expenses.
- I have been informed by you of the need to obtain original receipts carrying details of: name of supplier; type of goods/services purchased; date expense incurred; amount expressed in the currency it was incurred; day it was made out.
- I have been advised by you of the need to keep the written evidence for at least five years.
- I have also been advised of the consequences and penalties which will arise if the information I have provided is incomplete or incorrect and does not strictly comply with the substantiation or nexus requirements. I have all income tax and substantiation documents necessary to support all the claims made in my income tax return. Where items are used for both business and private purposes.

- I advise that I have kept appropriate apportionment documents to verify my business usage claim. Further, I have instructed you to prepare the return based on my specific instructions. I have read and understood the return prepared for me.
- I declare: That I have disclosed to you all the income which I have earned that all of that income has been declared in the return. That all the claims for deductions and rebates which have been Included in the return are based on my specific instructions that while I did not have the receipts to substantiate the above claims at the meeting, I will make them available if required by the Tax Office. That you have clarified what written evidence will be required during an audit and penalties that may be applicable if incorrect claims are identified.
- I have been advised that, this engagement will not audit or verify the information provided, although you may ask for clarification of such information as well work in connection with the returns does not include any procedures designed to discover errors or other irregularities in the information provided to me/us, should any exist. No audit or prudential review will be undertaken as part of this engagement. Accordingly, no assurance is expressed nor can the engagement be relied upon to disclose defalcations or other irregularities.

I have been conversant that the ultimate responsibility for the correctness of a return rests with the taxpayer signing the return. Within the terms of this engagement, I will endeavour to ensure that amounts subject to tax as disclosed in the returns are accurate. If the above details are not in accordance with your understanding of the Services we are to provide, or if you wish to discuss any aspect of this letter, please do not hesitate to contact me. Please sign and return the attached copy of this letter to indicate that it is in accordance with your understanding of the arrangements for our provision of Services. However, you will be deemed as having accepted the terms of this letter if you continue to instruct us after you received it.

In undertaking your work, we will acquire personal and sensitive information concerning you and your affairs and of others for whom you are authorized to provide information. We are committed to ensuring that this information is safeguarded in accordance with requirements under the Privacy Act.

In engaging us to carry out work for you, you agree that we are authorised to:

- ☐ collect personal and sensitive information in relation to you and other persons and entities who have authorised you to provide this information
- ☐ store this information indefinitely
- ☐ transmit this information to others in the ordinary course of business.

You agree, you will provide us with all necessary information to keep our records current.

I agree to the terms of this letter, as authorized representative.

Signature

Date: