



BUSINESS ACTIVITY STATEMENT REQUEST FORM

Thank you for allowing us to assist with your Business Activity Statement (BAS).

Please complete the below form as best you can and email it to us for fast and thorough preparation of your BAS.

Once we receive your completed form, we will then draft up your BAS and email it back to you for lodgement approval. If we have any queries we will phone you or email through a list of questions.

Important note: If you are a regular client, you know that we already have your basic information. Therefore, you are welcome to leave the personal details section on the next page blank.

Personal Information:

Full name:	
Address:	
Mobile number:	
Business name:	
TFN:	
ABN:	
DOB:	
Business activity:	
Business structure (sole trader / company / trust / partnership):	
Have you reviewed our <u>fees</u> ?	Yes No
Business bank details (name, BSB, account number):	

If relevant:

Have you invited us into your bookkeeping file?

Xero: sarah@freshwatertaxation.com.au

All others: enquiries@freshwatertaxation.com.au

Excel: please email through an Excel summary to enquiries@freshwatertaxation.com.au



Engagement of Freshwater Taxation as your Tax Agent for Your Business Activity Statement

We are pleased to accept appointment as your Tax Agent your Business Activity Statement (BAS).

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 Tax Agent we will:

- a) analyse, discuss and make recommendations regarding your BAS's; and
- b) prepare and lodge your BAS's

In addition to the financial information required to complete your BAS, it is expected that all relevant source documentation will be made available to us if requested and that all information provided on your BAS request form is correct.

You are responsible for compliance with the substantiation provisions of the Income Tax Assessment Act. *We will* not be responsible for any errors brought about by your failure to provide information or documentation later found to be material to your tax affairs. You are responsible for the timely provision of information and we will not be responsible for any late lodgement or other fees and fines brought about by your failure to act in a timely manner.

Professional fees and payments

Our standard professional fees are listed on our website.

Client's disclosure and record keeping obligations

You are required by law to keep full and accurate records relating to 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 the client by the practitioner. Inaccurate, incomplete or late information could have a material effect on services and/or conclusions. The *Taxation Administration Act 1953* now contains specific provisions that may provide you with "safe harbor" from administrative penalties for incorrect or late lodgement of returns. These safe harbor 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 harbor 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 harbor” 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 harbors created under new regime.

Client’s rights and obligations under the taxation laws

Taxpayers have certain rights under Australian 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 me/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.

Quality review

As a member of the Institute of Public Accountants, as Principal (Sarah Lissant-Clayton) I am subject to periodic Professional Practice Quality Assurance reviews. Unless otherwise advised, you are consenting to your files being part of such a quality review. This review is of our client records and not of you as a client and you have full assurances that complete confidentiality will be maintained throughout.

Yours faithfully,

Sarah Lissant-Clayton
Tax Agent No: 24161000
Freshwater Taxation

Acknowledgement and confirmation

I (taxpayer) hereby acknowledge and accept the terms of this engagement and agree to be liable for all fees for services performed in accordance with this agreement.

Signed:

Print Name:

Date: