

Mobile Tax & Accounting Solutions

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Wednesday, 9 December 2020

Xxxxxxx

Xxxxxxx

Xxxxxx

Dear xxxx,

We enclose the following for your attention:

**RE: LETTER OF ENGAGEMENT**

This letter sets out our terms of engagement and the scope of the work to be performed by Mobile Tax & Accounting Solutions. Please read it carefully and if you have any queries or wish to discuss any aspect, do not hesitate to contact us.

Since 1 March 2010, tax practitioners have been regulated in accordance with the requirements of the *Tax Agent Services Act 2009* (**TASA**) and the accompanying regulations. The TASA regime has implications for registered tax agents and also for their clients.

An important feature of TASA is the provision of a “safe harbour” protection from penalties in certain circumstances for taxpayers who engage registered tax agents.

To obtain the benefits of safe harbour protection, the legislation requires the taxpayer to provide the registered tax agent with “all relevant taxation information” to enable accurate statements to be provided to the Australian Taxation Office (ATO). This requirement may be important to both parties in identifying and understanding the purpose and scope of the engagement as set out below and may also affect other matters discussed below.

You will find further discussion on the safe harbour protections in the accompanying document entitled *Clients’ rights and obligations under the taxation laws*.

We may become ethically required to disclose non-compliance with laws or regulations to a regulatory authority if the non-compliance has a material effect on the work that we perform under this engagement.

If the terms of our engagement are acceptable, we ask that all persons sign the enclosed copy of this engagement letter in the places indicated and return it to our office.

Please note that we are unable to perform any work for you until we receive the signed copy.

Yours faithfully

**MOBILE TAX AND ACCOUNTING SOLUTIONS**

Ali Kasemi  
Tax Agent

**MOBILE TAX & ACCOUNTING SOLUTIONS LETTER OF ENGAGEMENT**

Thank you for choosing us to assist you with your tax return preparation. Mobile Tax & Accounting Solutions will provide taxation and accounting services to yourself and/or your business to assist you to meet your reporting obligations to the Australian Taxation Office (ATO). These services will be provided in accordance with the relevant professional and ethical standards required by the Tax Practitioners Board (TPB). The Income Tax laws place the responsibility for the accuracy and completeness of your tax return with you, therefore, we will work together with you to make sure the tax return we lodge is correct.

Please ensure that you provide all relevant information to our practice for inclusion in your tax return(s). You should also advise us if we have misunderstood or misinterpreted your circumstances, or if you have any questions please be sure to ask them.

***Our undertaking to you***

* We will conduct a thorough personal interview and ensure all appropriate deductions and relevant tax offsets have been claimed.
* We will explain any new tax laws that have come into effect the year(s) that have a bearing on your circumstances. This includes any Government announcements related to Covid-19 stimulus packages.
* We will explain to you your tax situation and give you an estimate of the result. If the assessment notice differs from our estimate, please contact us and we will explain why.
* We will ensure your tax return is completed in accordance with the requirements of the Australian Taxation Laws.
* We will look for opportunities to suggest any deductions that you may claim and what substantiation is required for that claim.
* We will undertake a face to face review of your tax return prior to lodgement and lodge it in a timely fashion.
* We will respond to your tax or other queries within a maximum 48-hour timeframe.
* We will provide you with a year-round service and support and will act as your liaison with the ATO in any matters relating to tax returns or business activity statements we prepare for you.
* Unless you ask us not to, we will provide you with our quarterly newsletter.
* Upon request provide you with copies of any signed documents that you may require from time to time.
* Your personal information is subject to strict confidentiality requirements. Mobile Tax & Accounting Solutions will not share any tax related or financial information with any parties except as required by law or as set out in our Privacy Policy. We will collect, hold and use your personal information in accordance with our Privacy Policy. Unless you elect not to receive information on related services from Mobile Tax & Accounting Solutions or its partner service providers, we may use your name and contact details to contact you in relation to these services or provide your name and contact details to our partner service providers so that they may contact you about these services.
* We will provide you with client information fact sheets to help you keep better records to improve your tax deduction claims and obligations.

***What we ask of you***

* Provide all necessary records and documents as required to complete your tax return in a timely manner.
* Keep full and proper records in order to facilitate the preparation of a correct return. Whist the Commissioner of Taxation will accept claims made by a taxpayer in an income tax return and issue a notice of assessment, usually without adjustment, the return may be subject to later review. Under the taxation law, such a review may take place within a period of up to five years after tax becomes due and payable under the assessment. Therefore, it is your responsibility to ensure you maintain your records for a period of no less than 5 years from lodgement.
* Notify us as soon as practically possible of any correspondence received from the ATO in relation to your taxation affairs.

***Payment terms***

Our base fee for a tax return includes standard income, deductions and offsets and covers the majority of our tax returns (ie Individual, Partnership, Company, Trust, SMSF Tax Returns). There may be additional charges on top of the base fee for completing Business Accounts and complex sections of the Tax return. This can include but is not limited to rental property schedules, capital gains calculations, business schedules and log books.

During the initial interview when you become a client with Mobile Tax & Accounting Solutions you would have been inducted with our **Schedule of Fees** outlining the various work we undertake to fulfill your Accounting and Tax obligations. If you would like a copy of our current Schedule of Fees please request this at reception.

Our fees for the preparation of your income tax and other documentation is payable upon completion and prior to lodgement of your return. Alternatively, if you do not wish to pay our fee upfront you may ask to have the fee taken out of your refund. Clients choosing this method will have their refund paid into Mobile Tax & Accounting Solutions Trust Account. The balance of their refund after their fee has been deducted will be released in most cases, to their bank account the next business day after Mobile Tax & Accounting Solutions receives it from the ATO. Please discuss these payment terms and the Fee from Refund option with the Director.

***Confirmation of engagement***

Once you are satisfied with the terms of this form, would you please have all persons sign and date both copies of this letter in the places indicated. One copy should be forwarded to us as evidence of your acceptance of the terms of our engagement. You should retain the other copy as your evidence of our engagement. We note again that we are unable to perform any work for you until we receive the signed letter.

We thank you for the opportunity to provide accounting and taxation services to your Group and we look forward to developing a close accounting relationship with you for many years to come.

Entity Name xxxxxxxxxxxxxx

Client Name xxxxxx

Sign \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Date \_\_\_\_\_\_\_\_\_\_\_\_