



**Engagement as your tax agent for an individual income tax return**

**Dated:**

To:

Thank you for instructions on dated \_\_\_\_\_ we are pleased to accept appointment as your tax agent for your tax returns.

At the outset, we need to enter into an agreement with you setting out the terms on which we will assist you, including how we will charge you for the work. Any changes must be mutually agreed and confirmed.

Period of engagement will start from the date \_\_\_\_ / \_\_\_\_ / \_\_\_\_

This letter set out the terms of the engagement. Any additions will be by the written agreement of both parties. Please read this letter and the Terms of Business carefully. If the terms are acceptable to you, please sign and return this letter to us. If you do not return a signed copy of this letter, but continue to provide us with information and instructions, we will assume that you have accepted the terms contained in this letter.

**Objective and Scope of Tax Services**

As your tax agent we will prepare and lodge your individual or as sole trader tax return.

In addition to the financial information required to complete your tax return, it is expected that you will make all available relevant source documentation to us or on request of ATO.

In preparing your individual tax return we will rely on the documents and information and expenses claim you provided, and representations made by you. Please review your tax return prepared by us and make sure all relevant supporting documents are ready with you, all deduction claimed in your tax return are directly related to your work and need to keep this record for minimum 5 years. Please make sure you have declared all your income such as, capital gain, investment property, interest or any other income and provide all necessary and relevant information to proceed with your tax return.

**Matters outside the scope of services**

In performing the Services, we will not perform an audit or review. Accordingly, no assurances are made in this regard. This engagement cannot be relied upon to disclose irregularities including fraud, other illegal acts and errors that may exist. However, we/I will inform you of any such matters that come to our attention. ATO audit and reviews are not a part of this engagement. In performing the services, we / I will not review the accuracy of any previous tax returns lodged by you or by a previous tax agent. Any advice given to you is only an opinion based on our knowledge of your particular circumstances.

Professional fee and payments: \$ \_\_\_\_\_ for current year and mutually agreed upon for the future years. Should be paid in 7 days, prior to the lodgment of tax return with ATO. Fees are based on reasonable estimates and the actual cost may vary.

**Acknowledgement and confirmation**

I/We, 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..... Name. .... Dated...../...../.....

**For Fair Tax Accountant**

Signed..... Name.....Dated`