

2025 GENERAL ENGAGEMENT LETTER FOR INDIVIDUAL TAX RETURN PREPARATION

This engagement letter is to inform you, the individual client, of the services we will provide you and the responsibilities you have for preparation of your tax return.

Tax Return Preparation

- We will prepare your tax return based on information you provide. Services for preparation of your return do not include auditing or verification of information provided by you.
- This engagement does not include any audit or examination of your books or records. In the event your return is audited, you will be responsible for verifying the items reported.
- You must review the return carefully before signing to make sure the information is correct.
- The tax return preparation fee does not include bookkeeping.
- Fees must be paid before your tax return is delivered to you or lodged for you. If you terminate this engagement before completion, you agree to pay a fee for work completed.
- A retainer of 50% of the quoted fee is required for preparation of late returns.
- Fees charged for tax return preparation do not include audit representation or preparing materials to respond to correspondence from the Australian Taxation Office. Such engagements are outside the scope of this general engagement and quoted separately.
- Preparation fees do cover limited assistance and consultation during the year. These additional services will incur additional/separate service fees under separate scoping engagement.
- The engagement to prepare your tax returns terminates upon delivery of your completed returns and original documents to you. Please store your supporting documents and copies of your tax returns in a secure place for at least five years from the date of lodgement as this information will be required in the event of audit.
- Advice given verbally in the process of preparing your return is not intended to be relied upon unless confirmed in writing. If we provide verbal advice (for example during a meeting or telephone conversation) that you wish to rely on, you must ask us to confirm in writing.
- We may need to verify your identity and request such information as required for this purpose.
- At peak tax periods we allow a turnaround time of two weeks for completion of your return.

Taxpayer Responsibilities

- You agree to provide us all income and deductible expense information. If you receive additional information after we begin working on your return, you will contact us immediately to ensure your completed tax returns contain all relevant information.
- You agree to provide all information necessary for dealing with your affairs including information which we reasonably request in sufficient time to enable our services to be completed before any applicable deadline.
- We will rely on the information you provide to be true, correct and complete.
- You confirm that all expenses or other deduction amounts are accurate and that you have all required supporting written records. In some cases, we will ask to review your documentation.



Tax Agent
26259663

- You must be able to provide written records of all items included in your return if audited by the Australian Taxation Office. We can provide guidance concerning what evidence is acceptable.

Signature: By signing below, you acknowledge that you have read, understand, and accept your obligations and responsibilities and that you understand our responsibilities in preparing your tax returns as explained above.

Client Name (Printed):

Signed: _____ Date: _____



Tax Agent
26259663



INFORMATION REQUEST

Full Name: _____

Phone Number: _____

Email Address: _____

Date of Birth: _____

TFN: _____

Address: _____

Bank Account Details for any refund: _____

Income Details:

Employment: _____

Bank Accounts generating interest: _____

Dividends from shares: _____

Cryptocurrency: _____

Capital Gains Events: _____

Work Related Expenses:

Deductions: _____

Sole Trader/Partnership Business Income & Expenses: Yes/No

Private Health:

Private Health Details: _____

Spouse Details: _____

Number of Children: _____

Please note that all deductions must have receipts/invoices/bank statements to verify

Please add as an attachment any other relevant information

