

# ROCKINGHAM TAX HUT

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## Advice of Engagement Personal Income Tax Returns

Date:

Dear Client

Thank you for appointing us as your Tax Agent. We always seek to act in the best interests of our clients and at all times we offer what we believe is the highest level of professional services.

The scope of our engagement is limited to the preparation and lodgement of your income tax return. A copy of the return will only be provided for an additional fee of \$10.00 upon request.

This engagement will be conducted in accordance with the relevant standards and ethical requirements of Chartered Accountants Australia and New Zealand.

### Information contained in the Income Tax Return

All income declared and deductions claimed in the tax return are based on information provided by you. The tax return includes income from all sources, and is reported in full, while receipts are available for all deductions claimed, including education. It is your responsibility that the information you provide to us for preparation and lodgement of your income tax return is true and correct.

### Professional Fees and Payments

The fee for preparation and lodgement of a basic income tax return (i.e. < 3 PAYG Payment Summaries and minimal work related deductions) is from ~~\$187.00~~. Additional fees for work related travel deductions, investment property schedules, capital gain calculation, etc are payable.

### Terms of Payment

The terms of payment are on completion of the Income Tax Return either by cash or EFTPOS. Payment by cheque will be accepted if arranged prior to appointment.

### Deduction of Fees from refund

For an additional charge of ~~\$55.00~~ we can deduct our fee for service directly from any tax refund. In accordance with the requirements of the Chartered Accountants Australia and New Zealand (CA ANZ) your refund will be deposited into our trust bank account, the fees will be deducted and the remaining amounts forwarded to you in accordance with your requirements. Please allow an additional 2-3 days later for our processing time.

### Lodgement of Income Tax Returns

An income tax return will be lodged after payment has been received in full or an authorisation to deduct our fee from the refund has been signed.

**Payment Method:** (Please tick payment option)

- I wish to pay on the day
- I wish to have the fee deducted from the refund

I received **Pandemic Leave Disaster Payment** due to COVID-19      YES      NO

Rockingham Tax Hut  
Tax Agent  
Agent no. 00168008

**Client Signature**  
Client Name:

**Client ID witnessed –**  
*Drivers Licence/Passport/Other...*