

Scope of Engagement

INDIVIDUAL

Individual's Name: _____

Period of Engagement: _____ 1/7/2022 to 30/6/2023

Blatch Consulting, as a registered Tax Agent, (Reg. No.25255970) is subject to the requirements set down by the Tax Practitioners Board to be 'engaged' by our clients for the services being provided. We are therefore pleased to set out the scope of our engagement as your Accountants & Tax Agents.

You have been provided with our Terms of Engagement (TOE), which provides detailed information of the engagement expectations of both you and Blatch Consulting. Our engagement is confirmed when you complete the acknowledgment and acceptance below.

Blatch Consulting will:

1. Analyse, discuss and make recommendations regarding your Taxation matters incl. BAS (If applicable).
2. Prepare and lodge your tax return/s, review assessments and advise on appeal processes where necessary.
3. Prepare Financial Reports and Documents in accordance with the Australian Accounting Standards.
4. Provide general accounting and taxation advice as well as business advice and support, as required.
5. Act as your contact with the Australian Tax Office for matters relating to your taxation affairs.
6. Act as your contact with ASIC for corporate matters, (if applicable).
7. Undertake other work as agreed.

In addition to the basic financial information essential to complete your financial reports and tax returns, it is expected that:

1. Source documentation will be made available if required to verify the claims, and
2. The responsibility for compliance with the substantiation provisions of the Income Tax Assessment Act rests with you.

Privacy Statement

We are bound by the provisions of the Privacy Act to maintain all the client's records securely and in accordance with the provisions of that Act. Please note that unless you specifically forbid it, our client files may be required as part of our Quality Review undertaken by our professional body the IPA. As a Tax Agent we are subject to the code of professional conduct established by the Tax Agent Services Act 2009 (TASA). This code requires that unless legally required to, we cannot disclose personal or financial information to a third party without the client's permission.

Fees

	Compliance Services	Range of Fees
A1	Individual Tax Return – Salary & Wages – Basic	≤ 2 x Payment Summaries + 5 WRE + PH Insur \$165
A2	Individual Tax Return – Salary & Wages – Non-Basic	+ Rental, M/V, Asset, CGT, or other Schedule(s) \$225 to \$550
A3	Tax Consulting/Advice	CGT, FBT, Income Tax, Salary Sacrifice etc. \$220 per hour

Terms of Payment

- Individual - Annual Tax Return Preparation
Individual taxpayer with income sources including employment, investments, pension, trust distributions, or hobby, however, does NOT include income derived from a business carried on under an ABN.
- Payment is required under one of the following options:
 1. At completion of initial meeting or at completion of Tax Return (and before lodgement of tax return)
 2. Deducted from Tax refund, as authorised by client on signing of tax return (Electronically or in person). If insufficient funds result from the Tax refund, you will be invoiced for the fee and no funds released until payment is finalised.
 3. Only at the Directors discretion - Invoiced at completion of Tax Return and paid within 14 days from Invoice date. The tax return will not be lodged until full payment is made to Blatch Consulting as per Invoice.

Please note: Should the invoice or agreed payment arrangement be unpaid by the due date, Blatch Consulting reserve the right to use a debt collection agency or other legal means to recover outstanding fees.

Blatch Consulting will utilize our professional experience, knowledge and technical skills at all times to maximise the taxation benefits to you. Should you have any question regarding any of the above, please do not hesitate to discuss with Julie or Tim.

This engagement will remain in place until rescinded by either party by notification in writing to the other party.

Kind Regards,

Tim & Julie Blatch
Directors

Please confirm our engagement as your Accountant and Tax Agent by providing all details requested below:

I hereby acknowledge and accept the Terms of Engagement of Blatch Consulting, as displayed on their website.

Individual's Full Name: _____

Individual's Tax File No. (TFN): _____

Date of Birth: _____

Signature: _____

Date: _____