

21st July 2024

To Whom It May Concern:

**Re: Information we are required to Disclose to You
under S45 of the Tax Agent Services (Code of Professional Conduct)**

As a Tax Agent, my work for you is performed in accordance with the Tax Agent Services Act 2009. Under this Act, the Tax Agent Services (Code of Professional Conduct) Determination 2024 requires that I make the following disclosures to you.

Personal Disclosures

I must disclose ANY MATTER that could significantly influence your decision to engage us (or continue to engage us) for a Tax Agent Service from 1 July 2022 onward. These include the following:

- I am currently receiving treatment for postnatal depression and PTSD from birth trauma as well as suffering a currently undiagnosed eating disorder.
- I have two children who are often ill who require care and often this makes me ill.
- I work part-time to balance family and work life.
- I have opinions on most controversial topics that may not align with your views. I will not list them all here, but should you have anything you wish to discuss I am happy to disclose my opinions to you so you may make an informed decision. These include topics like indigenous rights, disability rights, LGBTQIA+ rights, political affiliations, sporting affiliations, sexual discrimination and body autonomy.
- I have no current or previous disciplinary complaints or proceedings made via the ATO, Tax Practitioner's Board (TPB) or CPA Australia.

Register of Tax Agents

The TPB maintains a register of Tax Agents and BAS Agents. You can access and search this register here: <https://www.tpb.gov.au/public-register>

How to Make a Complaint about Services we Provided

If you have a complaint about our Tax Agent services, please contact Allison Scholar - Director by email. Your complaint will be investigated by the Director who is not involved in the subject matter of the dispute where possible.

We will provide you with email acknowledgement of receipt of your complaint and our understanding of the circumstances. The email will inform you that we will attempt to resolve your complaint with 14 days and will outline the dispute resolution process.

If you are unhappy with the outcome that we propose to you, you can then make a complaint to the TPB using the link listed above. The TPB will send you an email to acknowledge the receipt of your complaint and review and risk assess your complaint.

If you are unhappy with how the TPB has dealt with your complaint, the above link includes details about your review rights and who can further assist you.

Yours faithfully,

Allison Scholar
Director