

## AMG Tax Services

Suite 1, 25 Miller St, Epping VIC 3076

0422 999 985, 0417 408 272

admin@amgtax.com.au

www.amgtax.com.au

ABN: 83 686 701 674



### Our Responsibilities

Please be aware that we will not conduct an audit or review as a service to be performed for you and accordingly, no assurance will be expressed.

Unless specified above as a service to be performed for you, this engagement cannot be relied upon to disclose irregularities including fraud, other illegal acts and errors that may occur. However, we will inform you of such matters if they come to our attention.

We will perform taxation and bookkeeping services in accordance with professional and ethical standards. These standards require that, in undertaking this engagement, we comply with the relevant ethical requirements of APES 110 *Code of Ethics for Professional Accountants (including Independence Standards)*.

Pursuant to the Responding to Non-Compliance with Laws and Regulations (NOCLAR) requirements of APES 110, we are required to report any non-compliance with laws and regulations or acts of omission or commission, intentional or unintentional by a client or by those charged with governance, by management or by other individuals working for or under the direction of a client which are contrary to the prevailing laws or regulations.

### Your Responsibilities

To ensure the smooth and timely delivery of services you will need to provide specific information and take certain actions. These can vary depending on the nature of the services engaged, but here are some common requirements:

- Provide accurate and complete information relevant to the tax lodgment and BAS lodgment processes.
- Ensure timely access to necessary documentation and records.
- Communicate promptly about any changes in circumstances that may affect the services provided.
- Respond to any queries or requests for additional information in a timely manner.
- Facilitate coordination with any third parties involved in delivering the required services.

## **Professional Fees and Payments**

All professional fees for the services provided will be based on the time and skill required to complete the tasks, including out of pocket expenses and statutory charges.

Our professional fees are (subject to written notification of changes):

Principal	\$250 per hour
Accountant	\$150 per hour
Secretarial	\$90 per hour

For work undertaking for a period of less than an hour, the rate shall be charged in 6-minute blocks or part thereof. All professional fees are GST inclusive.

## **Ownership of Documents**

The final documents which we are specifically engaged to prepare, together with any other original documents given to us, shall remain your property. Documents brought into existence by us including any templates, BAS workings working papers, always remain our property. However, we will provide you with copies of any documents you require from time to time.

## **Quality Review**

As a member of the Institute of Public Accountants (IPA), we are subject to the IPA's Quality Review Program (QRP) mandated by the International Federation of Accountants (IFAC). QRP reviews assess member compliance with the professional and ethical standards and by accepting our engagement you acknowledge that, if requested by IPA, our files relating to this engagement may be made available for QRP review. Unless otherwise advised, you are consenting to your files being part of a QRP review.

## **Professional Standards Scheme**

As a member of the IPA, we are part of the IPA Professional Standards Scheme, and our liability is limited by a Scheme approved under Professional Standards Legislation. For more information on the IPA Professional Standards Scheme or Professional Standards Schemes generally, please refer to: [www.psc.gov.au](http://www.psc.gov.au).

## **Privacy and Third-Party Involvement**

We may collect your personal information directly from you or your authorized representatives, from third parties where you have provided your consent, or where the collection of your personal information is permitted by law.

The types of personal information we collect include general identification information such as names, occupation, and date of birth, contact details such as address, email address, and mobile phone number, government-issued identification numbers such as tax file numbers, financial information, and information regarding your superannuation and/or insurance arrangements. To provide our taxation and bookkeeping services, we may disclose your information to third parties engaged to perform administrative or other business management services. We have outsourcing arrangements with our bookkeeping/admin/accounting team in India whom we engage to assist us. The nature and extent of the service we utilize are bookkeeping, payroll services, tax and bas preparation services, administrative and business services.

Generally, we collect, use and disclose your personal information for the purpose of providing you with Taxation and bookkeeping services. If you do not provide your personal information to us this may affect our ability to assist you.

Any disclosure is always on a confidential basis. We may also disclose your personal information if required or authorized by law. We may disclose personal information to overseas recipients to provide necessary taxation and bookkeeping and for administrative or other business management purposes. Before disclosing any personal information to an overseas recipient, we take steps reasonable in the circumstances to ensure the overseas recipient complies with the Privacy Principles or is bound by a substantially similar privacy scheme unless you consent to the overseas disclosure, or it is otherwise required or permitted by law.

In providing our services to you, we utilize cloud computing systems provided by Microsoft, their data servers are in Australia and overseas. This term of engagement is a contract between you and AMG Tax Services, and you agree that neither of the third parties we use will have any liability to you and you will not bring any claim or proceedings of any nature in connection with this engagement against any third party that we may use to provide the services. This exclusion will not apply to any liability, claim or proceeding founded on an allegation of fraud or other liability that cannot be excluded under law.

### **TPB Register**

The TPB maintains a register of tax agents and BAS agents (tax practitioners) and this register can be accessed and searched at <https://www.tpb.gov.au/public-register>. The TPB's register confirms that I am a registered tax practitioner with no conditions imposed on my registration.  
<https://myprofile.tpb.gov.au/public-register/practitioner/?ran=26077430>.

All complaints should be raised with us at first instance with the view that your concerns can be resolved amicably between us. In the event that your concerns cannot be satisfactorily resolved, you may wish to raise a complaint with the TPB, the TPB's complaints process can be accessed at <https://www.tpb.gov.au/complaints>.

Further information is contained in an Information for Clients document on the TPB's website:  
<https://www.tpb.gov.au/sites/default/files/2024-10/Information%20for%20clients%20factsheet.pdf>.

### **Independence and conflicts of interest**

We have procedures in place to periodically assess our independence assigned to our engagement. We will notify you in a timely manner should we become aware of any conflict of interest or independence issues.

If during the engagement you become aware of any conflict of interest or potential conflict of interest or there is a change of circumstances which may result in a conflict, you must advise us.

Events that may give rise to a conflict of interest or potential conflicts of interest include:

- Events affecting you, such as deaths, matrimonial disputes as well as litigation (threatened or actual).
- Changes to the structure of your business or your business relationships.
- Offering an employment opportunity to a current or former employee of our practice.

### **Confidentiality**

We will conduct this engagement in accordance with professional and ethical standards issued by the APESB. The information acquired from you for our engagement is subject to strict confidentiality requirements and will not be disclosed by us to other parties except as required by law or professional and ethical standards, unless we have your written consent.

If you have any further queries, please do not hesitate to contact our office on 0422 999 985.

Kind Regards,

Amandeep S Sahni

Tax Agent Number: 26077430



Tax agent  
26077430