

Tax Practitioner Obligations

As a Tax Agent, our services are performed for you in accordance with the law, including the Tax Agent Services Act 2009 (TASA). Under this Act, the [Tax Agent Services \(Code of Professional Conduct\) Determination 2024](#) requires that we provide you with all information that is reasonably relevant to assist you in making a fully informed decision as to whether you engage us as your Tax Agent.

Tax Practitioners Board

The Tax Practitioners Board (TPB) maintains a register with details of registered, suspended and deregistered tax and BAS agents. This register is available to the public to search at <https://www.tpb.gov.au/public-register>.

The TPB's register confirms that we are a registered tax practitioner with no conditions imposed on our registration. Our Tax Agent Number is 25821263

Rights, Responsibilities & Obligations of Belay Advisory

Tax Agents have an obligation to the TPB and to their clients. The rights, responsibilities and obligations of Belay Advisory include, but is not limited to; acting lawfully in the client's best interests, acting honestly and with integrity, having arrangements in place to manage any conflicts of interest, taking reasonable care to ensure the taxation laws are complied with, and providing services in a competent and timely manner.

Your obligations as a client

As a client, you have an obligation to the ATO and to Belay Advisory as your Tax Agent. It is your responsibility to:

- Be truthful with the information you provide us
- Keep the required records and provide them to us on a timely basis, as required
- Be co-operative with our requests
- Comply with tax laws.

For more information on your obligations, please refer to the fact sheet published by the TPB: [Information for Clients](#).

Prescribed Events

We are obliged to advise clients of any events in the last 5 years which may influence your decision to engage us as your tax agent. There are no current nor previous issues that we are aware of.

We are also obliged to advise you whether there are any conditions attached to our registration. There are no current conditions attached to our registration.

Making a Complaint

We are committed to providing high quality professional services in an ethical manner, and this includes maintaining our responsiveness to the needs and concerns of our clients.

We acknowledge the importance of having an effective and efficient complaints handling process as part of a strong system of quality management, and we adopt a client-focused approach. While we acknowledge your right to make a complaint, we expect that you will treat our staff with respect when they are dealing with your complaint. We aim to handle complaints in a prompt, genuine, professional, and fair way.

Our [Complaints Policy](#) provides information on how clients can make a complaint and our complaint handling process.