

Keeping You Informed: What You Need to Know as a Client

Prepared by your Registered Tax Practitioner in line with the Tax Practitioners Board (TPB) requirements

Why You're Receiving This

As part of our commitment to transparency and professionalism, we're required to keep you informed about important matters that may affect your decision to engage or continue working with us. This is part of our obligations under the Tax Agent Services Act 2009 (TASA) and the Code of Professional Conduct.

What You Should Know

1. Who We Are

- We are a registered tax agent.
- You can verify our registration on the TPB Register: <https://www.tpb.gov.au/tpb-register>

2. How to Make a Complaint

- If you're unhappy with our services, you can lodge a complaint with the TPB.
- Visit: <https://www.tpb.gov.au/complaints>

3. Your Rights and Responsibilities

As our client, you have the right to:

- Receive services that are competent, timely, and in your best interests.
- Be informed about any conflicts of interest.

You are responsible for:

- Providing accurate and timely information.
- Keeping records and responding to our requests promptly.

4. Our Disclosure Obligations

We must inform you if, in the past 5 years:

- Our registration was suspended or terminated.
- We were convicted of serious tax or fraud-related offences.
- We were penalised for promoting or implementing tax exploitation schemes.

- We are subject to any conditions on our registration.

When You'll Be Informed

You'll receive this information:

- When you first engage or re-engage our services.
- Within 30 days if any relevant event occurs.
- Upon request.

How You'll Receive This Information

We may provide this information:

- In your engagement letter.
- On our website www.hoc.com.au.
- As a TPB factsheet or other written communication.

Want to Learn More?

Visit the TPB's website for more details: www.tpb.gov.au