



## TERMS & CONDITIONS

Gibson Tax and Accounting Service Pty Ltd (4You Accounting & Taxation) is authorised to review and assist in preparation, investigation and/or lodgement of tax returns and other associated obligations.

1. I acknowledge that 4You Accounting & Taxation will:

- a) Charge professional fees for the services provided that are based on the time, degree of skill and acumen required to complete the tasks undertaken in line with the indicative fee schedule plus any direct out-of-pocket expenses.
- b) Change my communication preferences with the ATO to forward all digital/physical correspondence to 4You Accounting & Taxation's secure inbox/PO Box, and forward all correspondence received on my behalf by email to my nominated email address. I understand the inherent insecurity of email and authorise all future correspondence to be emailed to me. I understand I am responsible for updating any email changes. I understand that 4You Accounting & Taxation are not responsible for the security of my documents stored by me digitally or otherwise.
- c) Upon request, arrange for fees to be deducted from tax refunds. This service will incur an additional administration charge of \$22.00.

2. I understand that:

- a) The Client Details Form, forms part of these terms and conditions.
- b) Face-to-face tax return and consultation invoices need to be paid on day of service or a 'Fee From Refund Agreement' entered into, at an additional charge of \$22.00 (administration fee).
- c) In the case where my refund/s are used in part or full to pay off Australian Taxation Office (ATO), Department of Human Services debt or similar, and my 4You Accounting & Taxation invoice is overdue, I agree to pay all outstanding fees immediately.
- d) All other accounts are payable within 14 days of invoice date, regardless of any client-initiated request for delay/cease of lodgement.
- e) If I default on any of these payment terms, I authorise GoCardless (user ID 488 299), to make this deduction on 4You Accounting & Taxation's behalf and to debit my account for any shortfall in fees owing to 4You Accounting & Taxation using Bulk Electronic Clearing System (BECS) and understand that this authority includes this Direct Debit Request. I am the authorised signatory of the stated account. I agree not to cancel this authority until any amount outstanding is repaid.
- f) 4You Accounting & Taxation have the right to recover costs of any debt collection activities or proceedings resulting from failure to pay the set fees. I accept responsibility for all collection and court costs incurred in the pursuit of outstanding debt on the account.
- g) 4You Accounting & Taxation will not be responsible for any lodgement penalties and/or interest I may incur.
- h) I will be responsible for any applicable costs and liabilities for adjustments after a data match review from the ATO.
- i) This engagement will continue until revoked by either party by giving the other party 30 days' notice in writing. This document will be effective for future years unless we advise you of any change.
- j) 4You Accounting & Taxation's Privacy Policy is available at [www.4you.net.au/accounting/privacy-policy/](http://www.4you.net.au/accounting/privacy-policy/) or via contacting them at [privacy@4you.net.au](mailto:privacy@4you.net.au) or 08 9528 5863.

By signing below, I hereby acknowledge that:

- I have reviewed my details in the Client Details Form.
- I confirm that the information given in the form is true, complete and accurate.
- I have read and agree to 4You Accounting & Taxation's Privacy Policy.
- I agree to all above terms and conditions.

SIGNATURE: \_\_\_\_\_ DATE: \_\_\_\_\_

FULL NAME: \_\_\_\_\_

**CLIENT DETAILS FORM**
**Instructions: Please complete all details, we are happy to assist.**

Full Name:	Title	First Name	Middle Name	Last Name
Date Of Birth (DOB):				
Tax File Number (TFN):				
Physical Address:				
Postal Address:				
Email:				
Occupation/Industry:				
Contact Telephone:				
Dependants names & DOB:				
Spouse/Partner Name & DOB:				
Trading Name:				
ABN:				
New Client? How did you hear about us?				
<b>YOUR BANK DETAILS:</b>				
BSB: _____ ACCOUNT NO.: _____				
ACCOUNT NAME: _____ BANK: _____				
Do you require assistance with your Loans/Mortgages	Yes <input type="checkbox"/>	<b>OFFICE USE ONLY:</b>		
Do you require assistance Insurance/retirement	Yes <input type="checkbox"/>			



## TAX RETURN CHECKLIST

Please bring the following to your appointment (if applicable)

### Individuals:

- PAYG Payment Summaries / 'Tax Ready' status received on Income Statements
- Work-related receipts (tools, uniforms, training, etc)
- Income protection insurance
- Donations
- Last year's Tax Agent fees
- Dividend statements
- Sale of any shares (please bring purchase and sale details)
- Managed Investment Fund Tax statements
- Partner/spouse's income
- BSB and Account number for any refunds
- Plus, any other documents you think are necessary

### Rental Properties

- Rental income
- Insurance
- Interest on loan
- Council rates
- Water rates
- Depreciation schedule
- Repair expenses
- Rental Agent fees
- Strata/Body Corporate fees
- Plus, any other documents you think are necessary

Should you have any questions please do not hesitate to contact us on:

<b>Rockingham</b>	<b>(08) 9528 5863</b>
<b>Bunbury</b>	<b>(08) 9701 9470</b>