



Date: ____ / ____ / ____

Terms of Engagement (Individual Tax Returns)

Palani & Associates have been preparing Income Tax Returns for 25 years. We prepare around 600 individuals; Company tax returns every year. For further information about us, please visit our website: www.palani.com.au.

What we will do for you:

- Discuss with you and prepare your tax return and all necessary schedules, based on the information supplied by you.
- Print the "Tax Calculation" estimate and provide the same to you.
- Electronically lodge the tax return with the Australian Taxation Office upon your confirmation and approval.
- Please be aware any advice provided to you is only an opinion based on our knowledge of your particular circumstances.
- E-Mail our Quarterly newsletter and Court Report.

What we will not do:

- Audit your work or verify the original receipts/ invoices.
- Retain any of your original documents, including all PAYG Payment Summaries (these are returned to you).
- Print the entire tax return and schedules, however, we will be happy to e-mail the same in PDF format upon request.
- Provide any specific "Financial Planning" advice unless you are our "Financial Planning" client.

What you, as our client, need to do:

- You are obliged under self-assessment to keep full and proper records in order to facilitate the preparation of returns
- You are responsible for the accuracy and completeness of the particulars and information provided in relation to taxation services and this responsibility rests with you.
- Retain all your original documents, including PAYG Payment Summaries, receipts, tax assessment notice etc for at least 5 years after the return is lodged.
- Contact us if you receive a letter/ amendment notice or a phone call from the Tax Office regarding the tax return lodged by us.

Fees:

Our fees will be billed at the completion of our work. This is based on the time required and complexity. Payment of any invoice is required to be made within seven [7] days, unless special alternative arrangements are made with us.

This letter will be effective for future years unless either of us advise of any change in our arrangement. Please sign and return this letter to indicate that it is in accordance with your understanding of the arrangements. If you would like to discuss any matters in relation to the terms of our engagement or the contents of this letter, please do not hesitate to contact me on (08) 8332 2177.

Your Sincerely
For Palani & Associates Pty Ltd

A handwritten signature in black ink, appearing to read 'R. Palani', written over a light blue horizontal line.

Ramiah Palani CPA
Accountant & Tax Agent (TAN 63876001)

I/We hereby agree to the above Terms and Conditions of Engagement

Signature: 1. _____ 2. _____

Full Name: 1. _____ 2. _____
(Print)

