

“Terms & Conditions of clients engagement and inquiry”

Engagement Letter Requirement:

- In compliance with the Australian Tax Practitioner’s Board, a client Engagement Letter is issued for each task and requiring client’s signature and agreement.
- This online application serves as your formal request to us and constitutes an engagement letter. By submitting the online engagement application form, you acknowledge and accept that your application is governed by the terms of the engagement letter related to your inquiry. This authorization permits us to access your personal and financial information held by the Australian Taxation Office, as well as potentially by other Australian government agencies, including ASIC. Such access is essential for verifying your identity prior to the provision of any of our services.

Transition Process for New Clients:

- If choosing Capital Accountancy as your preferred firm, we may inform your previous accountant/tax agent and request outstanding matters and files. Prompt provision of contact details expedites file transfer.

Client Responsibilities:

- Clients are responsible for providing detailed information, documents, and evidence to ensure accurate and reliable results in document preparation and lodgement.

CONFIDENTIALITY NOTICE:

- All information discussed is PRIVATE & CONFIDENTIAL.

Service Fees and Payments:

- Capital Accountancy charges fees for compiling, completing, and electronically lodging files. Receipts are provided upon client request.
- Initial 10-minute consultation is complimentary. Subsequent consultations are billed on a half-hourly basis, varying according to technicality and depth of consultation.
- Fees are charged per task and must be fully paid in advance.