

Lodging with a Registered Tax Agent

When you use us as your 'Registered Tax Agent' to prepare and lodge your tax return, you are ensuring a professional is looking after you. As a Registered Tax Agent, we are the only professionals permitted to charge a fee to prepare and lodge your tax return.

You will need to organise all your required tax records to bring to us at your appointment.

Why choose a 'Registered Tax Agent'

Tax agents must be registered with the Tax Practitioners Board (TPB). Using a Registered Tax Agent will provide you with consumer protection as the TPB ensures we meet and maintain the required standard or qualifications and experience, comply with the Code of Professional Conduct and discuss the service to be provided so we both know what to expect.

Due dates for lodging tax returns

As your Registered Tax Agent, we have a special lodgement program and can lodge returns for you after the usual 31 October deadline.

Lodging prior years' tax returns

If you haven't lodged a previous year's tax return, it's important to get up to date as soon as possible to avoid penalty. As your Registered Tax Agent, we can prepare and lodge prior year tax returns for you.



So what's new for individuals?

There are some changes you should be aware of in case they affect you.

Changes to payment summaries

You may not receive a payment summary from your employer this year.

Many employers are now required to report their employees' income, tax and super information directly to The ATO each payday, so you can find all your information in one place when you need it.

If you use us as your Registered Tax Agent to prepare your income tax return, you don't need to do anything. We are provided with a direct link to this information so are fully equipped to lodge your tax return as usual.

Accessing your payment summary or income statement

How you get your end of financial year information from your employer showing your earnings for the year (also known as a payment summary or income statement) depends on how your employer reports your income, tax and super information. You will be provided with either:

- An income statement – if your employer reports your income, tax and super information to us through Single Touch Payroll (STP) they are no longer required to give you a payment summary, this information will be made available to you through ATO online services finalised by 31 July.
- A payment summary – if your employer is not yet reporting through STP they will continue to provide you with a payment summary by 14 July (as they do now).

Your employer will let you know if they won't be giving you a payment summary this year. You should talk to your employer if you are unsure how they will be providing this information to you.

If you have more than one employer, you may receive both a payment summary and an income statement. You will need to check that income from your payment summaries is included in your return. This information may be pre-filled for you or you might need to enter it manually.

