

**Private and Confidential**

[client name]  
[client address]  
[client address]

[date]

Dear XXXX

**Engagement Letter – Provision of Services by Concept Accountants**

Thank you for your instructions to attend to the accounting and taxation requirements for your business entities and for your family. A list of the entities and individuals for whom we are to act (the Group) is set out in the accompanying Schedule and our comments below are directed to all those persons.

This letter sets out our terms of engagement and the scope of the work to be performed by us within that engagement. These terms of engagement are to be read in conjunction with our Service Contract, which displayed on our website and may be updated or amended from time to time. Importantly, we refer you to Part B of the Service Contract, which outlines your rights and obligations under the taxation laws.

If the terms of our engagement are acceptable, we ask that all persons sign the enclosed copy of this engagement letter in the places indicated and return it to our office. Where you do not sign this document but provide us instructions to commence performing services, the terms of this engagement letter and Service Contract are taken to be agreed.

**1. Scope of Work**

Our engagement is to attend to the following matters:



Prepare and lodge the BAS returns for your business entities;



Prepare the annual financial statements for your business entities;



Prepare and lodge the annual income tax returns for your business entities and your family;



Prepare and lodge the annual FBT returns for your business entities;



Prepare and lodge the superannuation returns for your superannuation fund;



Other work as requested.

Unless otherwise agreed, we will prepare the above returns and statements on an ongoing basis, in relation to the period following that for which the returns and statements have most recently been finalised, and for each subsequent period.

Each business entity and adult family member listed in the Schedule engages us on the terms set out in this letter and is bound by those terms. The business entities and adult family members listed are all jointly and severally liable to pay our accounts, regardless of which of the listed individuals or entities those accounts are addressed to and regardless of which of the listed individuals or entities received the benefit of the work performed.

## **2. Fees Charged**

Our services will be provided to you on a fee for service basis\* based on hourly rates and charged as set out below.

This letter relates only to the abovementioned services and details the basis and terms of this engagement. Unless otherwise agreed, our engagement will be limited to the matters described in this letter. Work that is performed or disbursements that are incurred which are outside the scope of this letter will be the subject of additional charge.

Unless otherwise expressly agreed with you in writing, our professional fees are charged at hourly rates, using six minute increments. Those rates are as follows:

| Operator                    | Hourly rate (plus GST) |
|-----------------------------|------------------------|
| <b>Principal</b>            | <b>\$210</b>           |
| <b>Accountant</b>           | <b>\$160</b>           |
| <b>Assistant Accountant</b> | <b>\$120</b>           |
| <b>Admin</b>                | <b>\$85</b>            |

The above rates may vary from time to time.

Subject to any agency arrangements for GST discussed below under the heading “**GST – Disbursements**”, disbursements properly incurred from external suppliers (couriers, ASIC fees, other Government fees etc) will be charged to you at cost plus GST.

Unless otherwise stated in writing, any estimates which we provide to you of our anticipated fees, disbursements and charges for any work are only indicative of the amounts you can expect to be charged. Estimates are not quotes or caps and are not binding on us.

Where an estimate is given and the scope of the work changes, or if it becomes apparent that the work involves matters which were not taken into account in the estimate, we will endeavour to advise you and provide an amended estimate as soon as it is practicable to do so.

Each client in the Group is jointly and severally liable to pay our fees in respect of all work performed for all members of the Group.

### 3. Confirmation of Engagement

Obviously, there are many issues to consider in this engagement and we ask that you consider all aspects of this letter to ensure that you are satisfied with the scope of our engagement. Please contact us if you have any queries about this letter, or any of the terms contained within our Service Contract on our website.



**Address:** U6 / 198-200 Main South Rd  
Morphett Vale SA 5162  
**Phone:** 1300 728 048  
**Fax:** 08 8382 9940  
**Email:** admin@conceptaccountants.com.au  
**Website:** www.conceptaccountants.com.au

Once you are satisfied with the terms of this letter, would you please have all persons sign and date both copies of this letter in the places indicated.

One copy should be forwarded to us as evidence of your acceptance of the terms of our engagement. You should retain the other copy as your evidence of our engagement.

We thank you for the opportunity to provide accounting and taxation services to you and your business and we look forward to developing a close accounting relationship with you for many years to come.

Yours sincerely

**Anthony Dutton**  
**Principal**



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## SCHEDULE

### CLIENTS

#### **Acknowledgment of terms of engagement**

We, the parties named in the Schedule, confirm that we understand and agree to your terms of engagement, and acknowledge our responsibilities as set out the terms of engagement.

Dated the \_\_\_\_\_ day of \_\_\_\_\_, 20XX

#### **Individuals:**

| Name | Signed                      |
|------|-----------------------------|
|      | .....<br>(Individual signs) |

#### **Companies:**

| Name | Signed                    |
|------|---------------------------|
|      | .....<br>(Director signs) |