



# Obtaining client instructions and authorisations

# Hyperlinks

#### SLIDE 7 - USING ENGAGMENT LETTERS

Find out more about the importance of engagement letters through our <u>practice note</u>.

Download your free Registered tax practitioner symbol.

### SLIDE 12 - CODE OF PROFESSIONAL CONDUCT

Find out more about your obligations under the Code of Professional Conduct.

## SLIDE 13 - CODE ITEM 3

Read our information sheet about holding money or other property on trust.

#### SLIDE 19 - HOW TO ACCOUNT FOR MONEY OR OTHER PROPERTY

Find out more information on APES 310.

#### SLIDE 23 - WHEN TO CLAIM A LIEN

Learn more about liens.

#### SLIDE 28 - CODE ITEM 6

Find out more about Confidentiality of client information for **BAS** agents and tax agents.

#### SLIDE 33 - OUTSOURCING AND OFFSHORING

Read out Practice note for more information on outsourcing and offshoring.

#### SLIDE 36 - MANAGING CONFLICTS OF INTEREST

Learn more about managing conflicts of interest for tax agents and BAS agents.

# SLIDE 41 - CASE STUDY

Read more of our compliance case studies.

# SLIDE 43 - STAY IN TOUCH

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