Five Steps to a Successful Tax Practice

Webinar resources and hyperlinks

Slide 4 – Meet your presenter

Read the Final Report of the Financial Services Royal Commission.

Slide 5 – Code of Professional Conduct

Learn about your Code obligations as a tax practitioner.

Slide 10 – Cyber security

Find out how to protect your practice from cyber-attacks.

Slide 11 – Outsourcing and offshoring

Refer to our guidance about outsourcing and offshoring.

Slide 13 – CPE is more than a Code obligation

Read about CPE for tax agents and BAS agents.

Slide 14 – CPE requirements from 1 July 2022

Check out our new CPE policy and learn how it affects your registration.

Slide 17 – Code item 9

Learn about your obligation to take reasonable care to ascertain your clients' state of affairs.

Slide 18 – Code item 10

Learn about your obligation to take reasonable care to ensure tax laws are applied correctly.

Slide 20 – Case study

Keep up to date with our latest compliance case studies.

Slide 21 – Proof of identity requirements

Refer to our proof of identity practice note when verifying client identities.

Slide 24 – Honesty and integrity

Read more about Code item 1 – acting with honesty and integrity.

Slide 25 – Personal tax obligations

Make sure you are complying with your personal tax obligations.

Slide 27 – What your clients should expect from you

Give our information sheet to your clients to help them understand what to expect from you.

Slide 28 – What to include in an engagement letter

- Find out what we suggest you include in a letter of engagement.
- Watch our webinar on engagement letters.
- Get answers to the frequently asked questions we receive about engagement letters.

Slide 30 – Stay in touch

- Register for free TPB webinars.
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