



Australian Government



TAX  
PRACTITIONERS  
BOARD

# Get ready for annual registration

**Presented by**

Debra Anderson, Board Member

Christine Gordon, Client Services, Director

# Welcome


*'In the spirit of reconciliation, I respectfully acknowledge the Traditional Owners and Custodians of Country throughout Australia and their continuing connection to land, waters and community. I would like to pay my respect to them and their cultures, and Elders past and present'.*

Access the presentation slides : [tpb.gov.au/webinar-hub](https://tpb.gov.au/webinar-hub)

## What we will cover today

- ✓ Recent changes to the *Tax Agent Services Act 2009*
- ✓ Annual registration
- ✓ Renewing your registration
- ✓ Tips to renew
- ✓ Q&A

**Changes to the *Tax Agent  
Services Act 2009***



# Important changes to the TASA



These changes  
impact tax  
practitioners  
directly

Law change	Start date
1. Prevent the engagement of disqualified entities	1 Jan 2024
2. Giving the Minister the ability to expand the Code	
3. Move to annual registration period	1 July 2024
4. Breach reporting – self reporting	
5. Breach reporting – another tax practitioner	
6. Updating of the objects clause in the legislation	1 Jan 2024
7. Enhance the TPB's financial independence	1 July 2024
8. Board member appointments	1 Oct 2024

# Annual registration



## Independent review



- Recommendation 4.7 of the Review recommended:
  - The registration period be converted to an annual period to reduce the regulatory burden.
  - The annual registration fee should be pro-rated, in comparison to the current fee.
- Annual registration is one of the components of *Treasury Laws Amendment (2023 Measures No. 1) Act 2023*.
- Starting from 1 July, the registration period will occur on an annual basis.

## Benefits of annual registration



- The streamlined process takes up to 30 minutes to renew.
- Pre-populated information – you only need to confirm or update.
- Quicker and easier to update us with changes to your information via your renewal form.
- Registration date will be the same date each year.
- Better aligns with registration models across the Commonwealth and other regulatory obligations.
- Ensures greater ongoing visibility of tax practitioner and will increase consumer confidence.



## How does this impact your registration?



- From 1 July, the registration period for tax practitioners will change from at least once every 3 years to at least once a year.
- These new annual registration requirements will apply to you from your next renewal date. For example:
  - If you renew your registration before 1 July 2024, you will remain registered for 3 years, until 2027. Your next registration in 2027 will be for a one-year period.
  - If you renew your registration after 1 July 2024, you will be registered for one year, until 2025. Your next renewal in 2025 will continue to be for a one-year period.

## Annual registration fee

The annual registration fee has been apportioned to equate to one third of the current 3-year registration fee.

*New fees apply from*

**1 July  
2024**

**i**

Annual registration fees:

- **tax agents – \$273**
- **BAS agents – \$54**

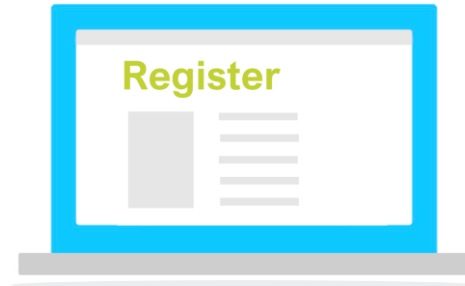
## Your ongoing registration requirements

- The annual registration period will align with other regulatory obligations, such as maintaining professional indemnity insurance and continuing professional education yearly requirements.
- There will be no changes to the CPE requirements.
- The annual declaration process will be retired and will no longer be a requirement for continued registration.



## New registrations

- The change in legislation applies to both new registrations and renewal applications submitted on or after 1 July 2024.
- New applications we will now have a maximum of 4 months to process and decide.
- For renewal of registration, you can continue working until we reach a decision.



# Tips to help you renew



## Your registration renewal

- Your renewal is available in My Profile 90 days before your expiry date.
- When it comes time to renew, we'll contact you to let you know.
- Keep your contact details up to date, so you don't miss important reminders.



Access My Profile: [tpb.gov.au/myprofile](https://tpb.gov.au/myprofile)

## Renew 30 days before expiry



- You must renew at least 30 days, before your registration expires.
- If you forget to renew your registration and it expires, you cannot provide tax agent or BAS services for a fee or other reward.
- You will lose access to ATO online services.



If your registration expires, you'll need to lodge a new application and wait for a decision to be made.



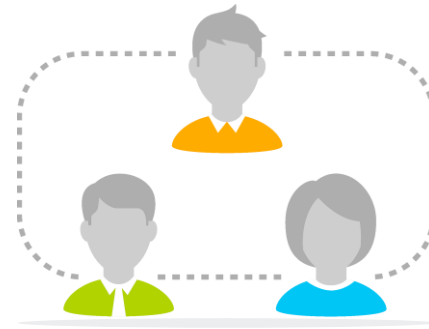
## Things to do before you renew as an individual

- ✓ If you haven't already, complete a one-off POI.
- ✓ Complete CPE.
- ✓ Have your professional association membership details handy.
- ✓ Have PI insurance in place.
- ✓ Complete your relevant experience.
- ✓ Update your contact details.
- ✓ Provide details of any events that may affect your eligibility to renew.



## Things to do before you renew as a partnership or company

- ✓ Have PI insurance in place.
- ✓ Have the details of the registered tax or BAS agents that make up your sufficient number.
- ✓ Have the details of directors or partners who are not registered individual tax or BAS agents.
- ✓ Provide details of any events that may affect your eligibility to renew.



## Multifactor authentication

- Multifactor authentication adds a layer of protection and helps prevent your account being accessed by unauthorised third parties.
- You are most likely familiar with multifactor authentication – many apps and programs use it.



If you need help check out our FAQs or instructional video on our website at [tpb.gov.au/mfa-faqs](https://tpb.gov.au/mfa-faqs).

### Action required

- Renewal due 30 days prior to 01/06/2024
- PII due 31/03/2022

#### My Profile

DE Approval Application

PI Insurance

Associations

Registered symbol

Manage registration details

Change password

Contact us

**Annual Registration** - Applications for registration and renewal of registration lodged from 1 July 2024 will have a one year registration period.

### Welcome

#### Registration Details

**Name**

Jane Brown

**Business name**

Jane R Brown

**Registration number**

00011111

**Registration Expiry date**

01/08/2024

**Registration option**

201 - Tertiary qualifications in accountancy

**Business address**

Suite 1

22 Australia Ave

Sydney New South Wales 2000

## Renewal application

If you have not already completed Proof of Identity (POI), you must complete each section up to POI in order, then you can complete the remaining sections in any order.

You must upload all required documentation; accepted formats are Word, JPEG, PNG or PDF.

Your form will be automatically saved as you complete each field. You can leave and return to your renewal at any time through My Profile.

Once you submit your completed renewal, a PDF copy will be sent to the email address you provide.

### Apply as a

- Tax Agent  
 BAS Agent

### This application is for an

- Individual  
 Company  
 Partnership

### Historical legal names

The TPB is required by regulations to publish for each registered entity:

- The name and any previous names an entity held in the last five years
- The current and previous registration numbers an entity held in the last five years
- The contact details of each entity
- The period(s) of each registration
- Any condition imposed on each registration
- Any sanction(s) imposed or decision to reject renewal on integrity grounds in the last five years, including the reasons for those decisions. Visit [Historical Legal Name](#) for further information.

TPB records indicate that you have held the following legal names in the previous 5 years:

Name updated from	Name updated to	Start date	End date
Jane Brown			

### HLN information correct?

- Yes  
 No

Next

i

If your legal name/s are incorrect or not displayed, notify us via our online form – [Update Legal or Practice Name.](#)

## Key points to note



- If you have all your information, it should take less than 30 minutes to complete.
- Your form will automatically prepopulate.
- Your form will automatically save as you complete each field.
- Before you submit – you must upload all required documents and pay your renewal fee.
- When attaching documents, accepted formats are Word, JPEG, PNG or PDF.
- A confirmation will be sent to you.

## Details

### TPB Register

If registered, the following information will be publicly accessible on the TPB register:

- registered tax practitioner name
- practice/business name and address
- any relevant professional affiliations (TPB recognised professional associations)
- duration of registration
- any conditions on the registration
- any sanction (other than a caution or termination) that has been imposed by the Board

The fields below identified with **R** will appear on the TPB register

If there are special circumstances about why any of the above information should not appear on the TPB register, [Contact Us](#).

If any of your details are incorrect, please amend in My Profile or call us on 1300 362 829 for assistance.

### Your name

Enter your legal name below. This must be the same name as on your identity documents.

**Title** **R** \*

Ms

**First name** **R** \*

Jane

I have no middle name(s)

**Middle name(s)** **R** \*

Rosalie

**Last name** **R** \*

Brown

**Suffix** **R**

--Select

**Gender**

- Male
- Female
- Do not wish to disclose
- Indeterminate, Intersex, or Unspecified

## Proof of identity



- Make sure your legal name on your ID is exactly the same as you used to register with us.
- If your legal name on your ID is incorrect, you must contact the responsible government agency to have it corrected.
- If your legal name on the TPB Register is incorrect, contact us.
- For help with the POI process, check out our video at [tpb.gov.au/poi](https://tpb.gov.au/poi)



Access our *Change registration details form*:  
**[tpb.gov.au/change-registration-details](https://tpb.gov.au/change-registration-details)**

# Professional indemnity insurance

Your latest PII details are not current, please enter new PII details.

Most recent PI insurance information

**Policy end date**

31/03/2024

**Policy start date**

31/03/2023

**Policy number**

HRT-PI-0000011

**Name of insurer**

PI Insure

**Amount of cover**

\$1,000,000 and over

It is an ongoing registration requirement to maintain a PI insurance that meets the TPB's requirements.



## Registration conditions

An applicant can request, or the TPB can impose, [a condition on registration](#) to limit the scope of tax services that can be provided.

In determining whether to impose a condition, the TPB considers the qualifications and experience of the relevant individuals providing services.

Details of any conditions will appear on the TPB Register.

- None

## Limit registration conditions

**Would you like to add any additional condition(s) to your existing conditions? \***

- Yes  
 No

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## Add Condition



Select a condition \*

Select

- Select
- BAS Services
- Capital Gains Tax
- Conveyancing
- Departing Australia Superannuation services
- Digital Games Tax Offset
- Debt and Insolvency services
- Excise
- Fringe Benefits Tax
- Fuel Tax Credit - specialty
- Goods and services tax - specialty
- Tax Returns - Individual**
- Indirect Taxes
- Other
- Payroll services
- Quantity Surveying
- Research and Development
- Registering Clients
- Salary Packaging
- Strata Management

## Relevant experience

Your registration option determines the required relevant experience displayed below.

For further details, see [relevant experience for tax agents](#).

### Registration option

201 - Tertiary qualifications in accountancy

### Requirement

Equivalent of one year full-time experience in past 5 years. See [Relevant experience for tax agents](#)

Do you meet this relevant experience requirement? \*

- Yes
- No

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Check our website [tpb.gov.au](https://tpb.gov.au) or  
call us: 1300 362 829

## Association membership

### Registration option

201 - Tertiary qualifications in accountancy

### Requirement

Not required

## Associations

Professional associations may be accredited by us as a recognised tax agent, BAS agent or tax (financial) adviser association if they meet certain requirements in the Tax Agent Services Regulations 2022 (TASR).

**Are you a current voting member of a TPB recognised tax agent association? \*** 

- Yes
- No

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## Continuing Professional Education

The TPB requires you to meet the continuing professional education/development (CPE/CPD) requirements set out in our [CPE/CPD requirements](#)

**Do you meet the TPB's CPE/CPD requirements? (Note: You may be required to provide evidence). \***

- Yes
- No

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Over 3-years tax agents must complete 120 hours of CPE and BAS agents must complete 90 hours – with a minimum of 20 hours per year.

## Fit and proper requirements



When deciding if you are a fit and proper person, we consider if you have:

- Held an undischarged bankrupt status.
- Been sentenced to or served a term of imprisonment.
- Been convicted of a serious tax offence.
- Been convicted of an offence involving fraud or dishonesty.
- Been penalised for promoting a tax exploitation scheme.
- Been subject to disciplinary action.
- Been subject to complaints or investigations.
- Outstanding tax obligations.

**Please select your payment method \***

- Government EasyPay
- BPAY Payments

Payment details

**Date the payment was made \***

DD/MM/YYYY



**Receipt number \***

**Amount paid \***

Attaching a copy of your payment receipt will help us process your application.

Payment Receipt



Add File

Maximum file size: **10MB**

Allowable file types: **PDF,JPG,JPEG,PNG,DOC,DOCX**

# Declaration

## Review

I have reviewed this application and want to submit it. \*

## Privacy notice

The Tax Practitioners Board is authorised under the Tax Agent Services Act 2009 to collect information requested in this form. Please refer to our [Privacy Notice](#) which outlines how we will use and store the personal information provided in this form.

## Declaration

I declare that:

I have answered all the relevant questions to the best of my knowledge, information and belief and they are true and correct in every particular.

I am aware that if I make a statement that is false or misleading in a material particular, then I may be guilty of an offence pursuant to section 8K of the Taxation Administration Act 1953.

I understand and will comply with the Tax Agent Services Act 2009, including the Code of Professional Conduct.

If requested, I will provide the TPB with relevant additional information or documentation in a timely manner.

Full name of person making the declaration \*

I have read, understood and agree with the above declaration. \*

- Yes  
 No

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Submit



[Home](#) > [My Profile](#) > [Renewal Application](#) > [Renewal received](#)

# RENEWAL RECEIVED



Your submission number is: 800157

A PDF copy of the submission will be sent to the email address associated with this account.

Thank you for your time.

[Return to My Profile](#)



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**[tpb.gov.au/renewals](https://tpb.gov.au/renewals)**

## Commonly asked questions

- ✓ Does the TPB provide an invoice when I pay my registration fee?
- ✓ Can I align my renewal dates?
- ✓ Can I suppress my address on the TPB Register?





# Questions

# Stay in touch with the TPB



[tpb.gov.au](https://tpb.gov.au)



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[tpb.gov.au/contact](https://tpb.gov.au/contact)



[linkedin.com/tax-practitioners-board](https://linkedin.com/tax-practitioners-board)



Australian enquiries  
1300 362 829



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Overseas enquiries  
+61 2 6216 3443



[youtube.com/TPBgov](https://youtube.com/TPBgov)

Our enquiry lines are open  
Monday to Friday 9 am to 5 pm  
(Sydney time)

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