

Statement of relevant experience tax agent

Completing this form

- This form must accompany an application for registration as an individual tax agent. It also needs to accompany an application for renewal if you need to demonstrate experience you gained before you were first registered.
- If the relevant experience includes work under the supervision and control of a registered tax agent, this form should be completed by the supervising tax agent.
- If the relevant experience includes work as an Australian legal practitioner or work of another kind, this form should be completed by the applicant.
- If insufficient space is provided at any item, please attach the additional information.
- Ensure you tick all applicable boxes.

1. Applicant details

Title

Family name

First given name

Other given names

2. Name of supervising tax agent making this statement (if applicable)

Registered agent number (if applicable)

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3. Type of relevant experience

Please tick one or more the following that applies to the applicant's relevant experience:

- Work by an individual under the supervision and control of a registered tax agent
- Work by an individual as a registered tax agent

If the applicant's experience involved work as a tax agent, provide their tax agent number below:

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- Work as an Australian legal practitioner
- Work of another kind subject to approval by the Board.

Note: If you believe you have relevant experience of 'another kind', you should also attach a separate submission with your online registration application outlining your experience and the reasons why you believe it should be approved. You should also provide independent verification of your experience. Visit tpb.gov.au > For tax practitioners > Tax agent registration > Individual > Qualifications and experience for tax agents > [Relevant experience for tax agents](#) for further information.

4. Did the applicant's relevant experience include substantial involvement in:
 a. One or more types of [tax agent services](#) described in section 90-5 of the *Tax Agent Services Act 2009* (TASA)?

No Yes Please provide details in the box below

b. A particular area of taxation law to which one or more of those types of [tax agent services](#) relate?

No Yes Please provide details in the box below

The Board may impose one or more conditions on an entity's registration to limit the scope of services that the entity may provide to a particular type of tax agent service or a particular area of the taxation laws.

5. During what period was the applicant providing the services in question 4 above?

	Day	Month	Year		Day	Month	Year	Hours per week if not full-time
From	<input style="width: 20px; height: 20px;" type="text"/>	<input style="width: 20px; height: 20px;" type="text"/>	<input style="width: 40px; height: 20px;" type="text"/>	to	<input style="width: 20px; height: 20px;" type="text"/>	<input style="width: 20px; height: 20px;" type="text"/>	<input style="width: 40px; height: 20px;" type="text"/>	<input style="width: 60px; height: 20px;" type="text"/>
From	<input style="width: 20px; height: 20px;" type="text"/>	<input style="width: 20px; height: 20px;" type="text"/>	<input style="width: 40px; height: 20px;" type="text"/>	to	<input style="width: 20px; height: 20px;" type="text"/>	<input style="width: 20px; height: 20px;" type="text"/>	<input style="width: 40px; height: 20px;" type="text"/>	<input style="width: 60px; height: 20px;" type="text"/>
From	<input style="width: 20px; height: 20px;" type="text"/>	<input style="width: 20px; height: 20px;" type="text"/>	<input style="width: 40px; height: 20px;" type="text"/>	to	<input style="width: 20px; height: 20px;" type="text"/>	<input style="width: 20px; height: 20px;" type="text"/>	<input style="width: 40px; height: 20px;" type="text"/>	<input style="width: 60px; height: 20px;" type="text"/>

6. This section must be completed by the supervising agent. Please provide comments on the applicant's level of competence in the provision of tax agent services.

7. Summary of tax agent services provided.

In relation to the applicant's relevant experience, provide below the **number** of returns or statements completed during the last **ten** years (if applicable).

Preparation of a return or statement in years 1 to 10.

Year	Year	Year	Year	Year	Year	Year	Year	Year	Year

Individual tax returns

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Partnership tax returns

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Company tax returns

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Trust tax returns

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Superannuation tax returns

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Activity statements (Instalment Activity Statements and Business Activity Statements)

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Percentage of working time providing tax agent services years 1 to 10

Provide below a percentage of working time spent in the provision of tax agent services in years 1 to 10.

%	%	%	%	%	%	%	%	%	%

8. This section must be completed by the applicant. Please provide any other information or comments regarding work of another kind that may be considered as relevant experience.

Checklist

Unless the applicant's experience has been gained while self-employed, this form has been completed by the applicant's employer or supervising tax or BAS agent.

Note: Where a supervising agent or employer appears to have completed this form, they may be contacted to verify information provided or obtain further details.

All questions on the statement have been answered truthfully and correctly.

Privacy notice

The *Privacy Act 1988* protects the privacy of individuals and sets out the Australian Privacy Principles (APPs) applicable to the collection, use and storage of personal information by Australian government agencies.

Personal information collected by the Tax Practitioners Board (TPB) is used and stored in accordance with the APPs and the [TPB's Privacy Policy](#).

The TPB will use the information collected in this form to assess the application for registration under Part 2 of the *Tax Agent Services Act 2009*.

If you do not provide the requested information, we may not be able to process the application.

Where we are authorised or required by the law to do so, some of the information collected from you may be provided to other government agencies including the Australian Taxation Office and Australian Securities and Investments Commission and third parties relevant to the application. This may occur, for example, in order to verify the information you have provided.

If you have an enquiry relating to how the TPB collects, uses and stores your information, including how to access and correct your information or to make a privacy complaint, email it to privacy@tpb.gov.au. Further information about our privacy practices is available in the TPB Privacy policy available at tpb.gov.au

Declaration

I declare that all information given in this statement, to the best of my knowledge, information and belief, is true and correct in every particular.

Full name of the person providing this statement

Signature of the person providing this statement

Date

<input type="text"/>	<input type="text"/>	/	<input type="text"/>	<input type="text"/>	/	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
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How to send the completed form

Upload the completed form at the place indicated on your online application for registration as a tax agent.

Further information

Visit tpb.gov.au or phone us on 1300 362 829.