

# How to manage and store client's documents efficiently and completely

## Hyperlinks

### SLIDE 5 – POLICY OBJECTIVE

For more information on your obligations to keep proper client records, refer to [our website guidance](#).

### SLIDE 6 – ACCURATE RECORD KEEPING

Read our Information sheet on [Obligation to keep proper client records of tax agent services provided](#).

### SLIDE 12 – RECORDS OF THE 'TAX AGENT SERVICES' PROVIDED

Read how your obligations apply in relation to each [tax agent service](#) provided to a client.

### SLIDE 16 – HOW LONG RECORDS NEED TO BE KEPT

You should refer to the [guidance](#) provided by the [Office of the Australian Information Commissioner](#) (OAIC) in respect to your obligations under the *Privacy Act 1988* and Australian Privacy Principles.

### SLIDE 18 – RECORDS CONTAINING TFNS AND TFN INFORMATION

Refer to the OAIC's guidance on [tax file numbers](#).

### SLIDE 20 – CLIENT OBLIGATIONS TO KEEP AND RETAIN TAX RECORDS

For more information about your recordkeeping obligations, refer to the [ATO's website](#).

### SLIDE 22 – RELATED RECORDKEEPING CONSIDERATIONS

Find out more about your obligations under Code item 6 in relation to the [confidentiality of client information](#).

## SLIDE 24 – QUALITY MANAGEMENT SYSTEMS

Read our Information sheet on [Supervision, competency and quality management under the Tax Agent Services Act 2009](#) to understand your obligations.

## SLIDE 31 – STAY IN TOUCH WITH THE TPB

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