



Australian Government



Questions at the coalface: CPE made simple

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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

You ask, we answer

- This is an open session where you can ask our questions in relation to your CPE obligations.
- To ask a question, navigate to the **Q&A tab** and enter your questions in the chat box.
- Send through as many questions as you like.



What we will cover today

- ✓ CPE overview
- ✓ Minimum CPE hours
- ✓ CPE period
- ✓ Relevant CPE
- ✓ Record keeping requirements
- ✓ Q&A



Overview of CPE

Overview of CPE

- CPE helps to maintain and enhance the required knowledge and skills relevant to the tax agent or BAS services you are registered to provide.
- Undertaking CPE is:
 - an obligation under the Code of Professional Conduct, and
 - a renewal requirement.



CPE is a renewal requirement for individuals

- You should start undertaking CPE as soon as you are registered with the TPB.
- You will need to confirm that you meet the TPB's CPE requirements when renewing your registration.



Minimum hours of CPE



Minimum hours of CPE



Category	Minimum hours
Tax agents	120 hours over 3 years, with at least 20 hours each year.
BAS agents	90 hours over 3 years, with at least 20 hours each year.
*Conditional tax (or BAS) agents	45 hours over 3 years, with at least 5 hours each year.



To learn more about CPE for conditional agents, visit
tpb.gov.au/cpe

CPE period



CPE period



- For new tax and BAS agents registered on or after 1 July 2022, our CPE policy applies from your registration date.
- If you are renewing your registration after 1 July 2022, our policy applies from the date your renewed registration period begins.
- If you are a member of a recognised professional association, you can align your CPE period with the CPE period of your association.

Relevant CPE

Relevant CPE



- CPE topics must be relevant to the tax agent or BAS services you provide and should be provided by people or organisations with suitable qualifications and/or practical experience.
- CPE topics can include those that help you run an effective practice and provide a competent service to your clients – for example: cyber security, practice management, digital literacy and ethics.
- You can also undertake up to 10% of educative mental health and wellbeing topics.

Types of CPE activities

- You can undertake a range of activities to complete your CPE such as, attending webinars, listening to podcasts, undertaking courses, face-to-face training, research and technical reading.
- We have a 25% cap on technical or professional reading activities.



Visit tpb.gov.au/cpe-activities for more examples.

Keeping records



Keeping records



- You must make a record of your CPE activities as soon as possible.
- We may ask you to provide your records at any time throughout your registration, including at renewal.
- You should include sufficient details about the activities you complete.
- To record your activities, you may use our CPE log or that of your recognised professional association.
- You must keep CPE records for 5 years.

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