



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. Full name of applicant

Title	Family name
<input type="text"/>	<input type="text"/>
First given name	Other given names
<input type="text"/>	<input type="text"/>

2. Supervising tax agent making this statement

Name of supervising tax agent (if applicable)

Tax agent number

<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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Details of relevant experience

3. Types 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:
- | | | | | | | | |
|----------------------|----------------------|----------------------|----------------------|----------------------|----------------------|----------------------|----------------------|
| <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> |
|----------------------|----------------------|----------------------|----------------------|----------------------|----------------------|----------------------|----------------------|
- 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 www.tpb.gov.au > *Qualifications & 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 Agents Services Act 2009* (TASA)?

No Yes Give details in the box provided below

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

No Yes Give details in the box provided below

Visit www.tpb.gov.au > Registering > Register as a tax agent for information about tax agent services.

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 type="text"/>	<input type="text"/>	<input type="text"/>	to	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
From	<input type="text"/>	<input type="text"/>	<input type="text"/>	to	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
From	<input type="text"/>	<input type="text"/>	<input type="text"/>	to	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

6. Provide comment on the applicant's level of competence in provision of tax agent services (to be completed by the supervising agent).

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 years 1 to 10

Year	Year	Year	Year	Year	Year	Year	Year	Year	Year
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

Individual

<input type="text"/>	<input type="text"/>	<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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Partnership

<input type="text"/>	<input type="text"/>	<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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Company

<input type="text"/>	<input type="text"/>	<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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Trust

<input type="text"/>	<input type="text"/>	<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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Superannuation

<input type="text"/>	<input type="text"/>	<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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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.

<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
%	%	%	%	%	%	%	%	%	%

8. Provide any other information or comments regarding your relevant experience.

To be completed by the applicant where the applicant's experience does not relate to periods of employment or periods under supervision

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 agent.

[Note: Where a supervising tax 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 Office of the Australian Information Commissioner (www.oaic.gov.au) is Australia's national privacy regulator. The *Privacy Act 1988* protects the privacy of individuals and sets out Australian Privacy Principles (APPs) applicable to the collection, use and storage of personal information by Australian government agencies.

The Tax Practitioners Board (TPB) will use the information collected from you in order to assess the application for registration under Part 2 of the *Tax Agent Services Act 2009* (TASA).

Section 60-15 of the TASA allows the TPB to do anything incidental or conducive to the performance of its functions, which includes the collection of information in relation to an applicant's relevant experience for the purposes of registration under the TASA.

The personal information collected will be used and stored in accordance with the APPs.

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

If you are completing this form as a supervising agent or employer, some of the information collected from you may be provided to the applicant applying for registration and other government agencies, including the Australian Taxation Office (ATO).

If you are completing this form as an applicant, some of the information collected from you may be provided to other government agencies including the ATO and third parties relevant to the application.

This may occur, for example, in order to verify the information you have provided and only where we are authorised under the TASA to do so and it is considered to be relevant to the processing of the application.

Further information about our privacy practices is available in our privacy policy on our website www.tpb.gov.au

For any enquiries relating to our collection, use and storage of your information, including how to access and correct your information or to make a privacy complaint, please contact the TPB privacy officer at TPBLegalunit@tpb.gov.au

Declaration

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

Full name of the person providing this statement

Date

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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 www.tpb.gov.au or phone us on **1300 362 829**.