Information we are required to disclose to our clients

As a Tax Agent, our services are performed for you in accordance with the law, including the Tax Agent Services Act 2009 (TASA). Under this Act, the Tax Agent Services (Code of Professional Conduct) Determination 2024 requires that we make the following disclosures to you.

There are no current matters that we are aware of that could significantly influence your decision to engage us (or continue to engage us) for a Tax Agent Service.

The Tax Practitioners Board (TPB) maintains a register with details of registered, suspended and deregistered Tax and BAS Agents. This register is available to the public to search at https://www.tpb.gov.au/public-register. Our registration number is 24677924.

Tax Agents have obligations to the TPB and to their clients. You also have obligations under the taxation laws and to your Tax Agent. Please refer to these obligations on the TPB website at https://www.tpb.gov.au/obligations or the TPB's fact sheet here: Information for Clients.

Both Tax Agents and clients have an obligation not to make false or misleading statements to the TPB or the Australian Taxation Office (ATO). If it becomes apparent a false or misleading statement has been made to either body, there is a requirement for this to be rectified in a timely manner. Please refer to these obligations on the TPB website at https://www.tpb.gov.au/code-obligations-when-making-or-preparing-statements.

If you have a complaint about our Tax Agent services, please contact us by email at tax@wealthmed.com.au. We will acknowledge your complaint by email within 3 business days, confirm our understanding of the issue, and advise you of our process. Where possible, your complaint will be reviewed by someone not involved in the matter. We aim to resolve all complaints within 10 business days. If you are dissatisfied with our resolution, you may escalate your complaint to the TPB at https://www.tpb.gov.au/complaints.