

## APPLICATION TO BE AN ABN TAX CLIENT MANAGER

### Part 1 - Applicant Details

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#### Your Personal Details

ABN Member Name

Email Address

Mobile Number

#### Your Business Details

Legal Name

Trading Name

Postal Address

Street

City

State

Post Code

Phone Number

Fax Number

### Part 2 - Application Criteria

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There are 4 criteria which must be met in order for you to be eligible to be an *ABN Tax Client Manager*. Please complete the following sections to demonstrate that you meet these criteria.

#### Criterion 1 - ABN Membership

You must be a member of Australian Bookkeepers Network (ABN).

I am a member

## Criterion 2 – Australian Business Number

Your bookkeeping business must have an Australian Business Number.

**Australian Business Number**

## Criterion 3 - BAS Services

You must be able to legally offer a BAS solution to your clients under the current law.

How do you comply with the Tax Agent Services Act 2009 in regards to the provision of BAS Services?

I am a registered Tax Agent under the Tax Agent Services Act 2009

I am a registered BAS Agent under the Tax Agent Services Act 2009

I facilitate BAS Services for my clients through ABN BAS

I facilitate BAS Services for my clients through another registered Tax Agent or BAS Agent

**Tax Agent/BAS Agent Name**

## Criterion 4 - P.I. Insurance

You must maintain a policy of Professional Indemnity (P.I.) Insurance with cover of at least \$500,000.

I do not hold P.I. Insurance but would like to obtain it now through ABN's strategic partner, Nationwide Insurance Brokers. Please email me the relevant information.

I already hold P.I. Insurance, the details are:

**Name of Insurer**

**Policy Number**

**Entity Insured**

**Level of Cover**

### Part 3 - Business Profile

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The following questions will assist us in gaining an understanding of your business.

How many years has your business been operating?

How many of your clients do you think will be candidates for *ABN Tax*?

### Part 4 - Acknowledgements

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I have read and understand the three step process to become an *ABN Tax Client Manager* which is explained on the [Become a Client Manager](#) page of the *ABN Tax* website.

I understand that the third of these three steps, being the *ABN Tax Induction Training*, is at a cost of \$352 GST-inclusive.

I acknowledge that *ABN Tax* may accept or decline this application at their absolute discretion.

I confirm that I have completed this form truthfully and accurately.

I understand that *ABN Tax* will not use the information collected on this form for any purpose other than to assess my suitability as an *ABN Tax Client Manager*, or to email me information on P.I. Insurance if I have requested this.

Please return this form either by scanning and emailing to [admin@abntax.net](mailto:admin@abntax.net); or by Bookkeeper-Client Connect.