

APPLICATION TO BE AN ABN TAX CLIENT MANAGER

Part 1 - Applicant Details

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

There are 5 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).

ABN Member Number

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 am taken to be a BAS Agent under the Transitional Provisions

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

Name of Insurer

Policy Number

Entity Insured

Level of Cover

Criterion 5 - Experience

You must meet our required levels of experience. There are two limbs to this criterion, both of which need to be met:

1. In the past 5 years, you must have had at least 3 year's experience as an employee of a contract bookkeeping business and/or as an owner of a contract bookkeeping business;

and

2. In the past 2 years, you must have had at least 1 year's experience as an owner of a contract bookkeeping business.

For the purposes of measuring "year's experience", you may count any periods of time where you have worked an average of more than 20 hours per week.

Please describe how you meet this criterion:

If you do not meet the experience criterion but believe you have special circumstances that would warrant us exercising our discretion, please describe these:

Part 3 - Business Profile

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

How many years has your business been operating?

How many staff and/or contractors do you employ or contract?

How many individuals or entities do you provide bookkeeping services for?

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

How many of these do you think will be candidates for *ABN Tax* in the coming three months?

Part 4 - Acknowledgements

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 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:

1. By scanning and emailing to admin@abntax.net
2. By Bookkeeper-Client Connect; or
3. By clicking