



Expression of interest

Client-to-agent linking pilot for tax and BAS agents representing individuals and sole traders.

About the pilot

The Australian Taxation Office (ATO) is seeking registered tax and BAS agents to participate in a pilot of the client-to-agent linking model for individuals and sole traders.

This will be an agent-initiated process, where the agent sends a digital nomination request to the client. Once the client accepts the request, the agent can then add them to their client list in Online Services for Agents or their practice software.

The pilot will help us test the process and refine communications and support arrangements to ensure the experience is effective and easy to use. The pilot will run from March to October 2027, with participant feedback helping to identify improvements and support future implementation activities.

To participate, you must:

- be a registered tax agent or BAS agent
- anticipate you'll onboard new individuals and sole traders as clients during the pilot period
- be willing to participate in pilot activities and provide feedback during the pilot period.

i For more information about the pilot, visit ato.gov.au/CALpilot

How to submit your expression of interest (EOI) form

Email your completed EOI to: ClientToAgentLinkingPilot@ato.gov.au with the subject line 'EOI Client-to-agent linking pilot'.

Section 1: Practice information

1 Practice name

2 Practice location

Street address

Suburb/town/locality

State/territory

Postcode

Expression of interest (continued)

3 Which services does your practice predominantly provide?

☐ Tax agent services ☐ BAS agent services

4 What is the Registered Agent Number (RAN) for your practice?

Registered agent number (RAN)

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5 Approximately how many clients does your practice service?

☐ Fewer than 100 clients

☐ 100 to 300 clients

☐ 301 to 500 clients

☐ 501 to 1,000 clients

☐ More than 1,000 clients

6 Does your practice provide services to any of the following client groups?

Deceased individuals

Yes ☐ No ☐

Foreign and temporary residents

Yes ☐ No ☐

Individuals who may require support to interact digitally

Yes ☐ No ☐

Other (please list)

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Section 2: Primary contact

7 Contact details

Title ☐ Mr ☐ Mrs ☐ Miss ☐ Ms Other

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Family name

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First given name

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Other given names

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Email

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Phone

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Mobile

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8 Role in practice (Job title, whether you are an employee, partner, owner, etc.)

Section 3: Declaration

By submitting this EOI, I declare that I:

- am authorised to submit this EOI on behalf of my practice
- my practice is compliant with all tax and superannuation obligations and will continue to meet these obligations
- to the best of my knowledge, the information provided in this form is true, complete and correct
- understand that participation in the client-to-agent linking pilot is voluntary and that selection for participation is at the discretion of the ATO
- if selected, I agree that my practice will participate in pilot activities for the duration of the pilot, where reasonably practicable, and provide feedback to support evaluation and future improvements
- understand that information collected through this expression of interest and during the pilot will be handled in accordance with the [ATO privacy policy](#).

Name

Position

Date

Day

 /

Month

 /

Year

☐ I acknowledge and agree to the above declaration.