



Tax practitioner assistance form

Use this form to request assistance in resolving administrative or tax and superannuation law related matters relating to your client or practice.

- ! This form will only be actioned if lodged through Online Services for Agents, and must be submitted as a PDF.
- ! All fields with an asterisk (*) are mandatory

Section A: **Contact details** (contact person for this request)

1 **Name***

Title: Mr Mrs Miss Ms Other

Family name

First given name

Other given names

2 **Practice name***

3 **Preferred phone number and email address***

Phone number

Email address

4 **Registered agent number (RAN) or Australian Business Number (ABN)***

RAN

ABN

Section B: **Client details** (individual or entity the transaction relates to)

5 **Name***

Title: Mr Mrs Miss Ms Other

Family name

First given name

Other given names

6 **Business name of client***

7 **Tax file number (TFN) or Australian business number (ABN)***

TFN

ABN


Section C: Request type

8 Request relates to (select one request type)*

Administrative matter

Tax and superannuation law related matter

Section D: Matter requiring Tax practitioner assistance

 If you do not complete Section D of this form it will not be processed and your application for assistance will be rejected.

9 Transaction type (select one transaction type)*

Income tax

Small business

Fringe benefits tax

Wine equalisation tax

Interest, dividend or royalty withholding tax

Fuel tax

Market valuation

Luxury car tax

Not for profit

Excise (alcohol)

Superannuation

Excise (fuel)

Goods and services tax

Excise (tobacco)

Other, provide details below

10 Describe the matter, facts and/or questions that you are seeking for resolution*

Provide client identifiers. If this is a law related matter, include your current interpretation and references.

11 Describe the interactions you have had with the ATO about this matter including research on ato.gov.au, the legal database, phone contact, correspondence and steps you have taken to resolve this matter*

Provide dates (even if approximate) and any ATO reference numbers.

! All fields on this form are mandatory. Your application will be rejected if parts are incomplete.

Acknowledgment of acceptance

I agree

- !** Please provide full and true disclosure of all relevant information. This will help speed up the resolution process.
- !** The ATO service standard is 28 days for written advice if all necessary information is provided.
- !** Submit this form to the ATO by following the step-by-step instructions found at ato.gov.au/TPA