[Insert DD Month YYYY]

|  |
| --- |
|  |

[Insert Client Name]

[Insert Client Position]

[Insert Company Name]

[Insert Client Address]

[Suburb State Postcode]

Dear [Insert Client Name]

**Re:** **[Insert year] Individual Tax Return**

We thank you for allowing us the opportunity to assist you with your taxation needs. We are pleased to enclose your Income Tax Return for the year ended 30 June [insert year].

Please review the Income Tax Return marked ‘Client Copy’ attached to this letter [OR attached as an email]. Please note that the income tax calculation is an estimate only, as PAYG Instalments and other disclosures in the return are dependent on the Australian Taxation Office (ATO) cross-referencing these amounts.

Once you are satisfied that the Income Tax Return is correct, please sign and date Parts A and B of the attached Electronic Lodgement Declaration, as well as sign and date the Taxpayer’s Declaration.

Upon signing these Declarations, please send them to us so we can lodge your return electronically with the ATO. You should receive your Notice of Assessment within 14 days of lodgement of the return. Please note that we have redacted your Tax File Number and bank account details to protect your identity for confidentiality reasons.

*The Taxpayer’s Declaration that you are signing confirms that the information you have provided us for the preparation of your income tax return is true and correct and that you are authorising us as your registered tax agent to lodge the return on your behalf.*

*Please note that you must also retain all records relating to the compilation of the income tax return for five years (in most instances) after the Notice of Assessment is issued. This will include receipts for expenses, logbooks, and other records. If you do not have these records, or have any questions about the necessary records, please contact us.*

We estimate that upon assessment you will be [required to pay income tax OR receive an income tax refund] of $xxx.xx. This amount has been calculated based on a taxable income of $xx,xxx.xx. [IF RELEVANT] Your Reportable Fringe Benefits figure for the year was $xx,xxx.xx. [IF RELEVANT] The amount of Higher Education Loan Program (HELP) repaid was $xx,xxx.xx. [IF RELEVANT]

We also enclose our account for the preparation and lodgement of your Income Tax Return.

Finally, we thank you for your support and the opportunity to be of service to you.

If you have further queries on any details contained in this letter or on any other matter, please feel free to contact us on [insert telephone number].

Yours faithfully

[Insert Name and Title]

|  |
| --- |
| Encl. |