

Protecting your Practice: Managing client risk and future uncertainty

2.5 Hour Live Streamed Seminar

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Presented by
Andrew Gardiner &
Rene Chan

Recent developments have massively reshaped the **legal** and **professional exposure** associated with running an **accounting practice**.

It is therefore vital that **all accountants** adopt the correct procedures and documentation.

In our Protecting Your Practice Seminar, we signpost the **key risk areas** and offer practical solutions.

Complimentary for
GOLD Members

Critical Traps and Tips with the NEW 'Dob-in' Provisions

- When are tax practitioners required to 'dob-in' clients under the new rules?
- Rights and obligations associated with the NEW 'dob-in' provisions and other tax practitioners
- Critical issues to consider when dealing with information requests from Government agencies (e.g., the ATO)
- Strategies to consider when dealing with frustrating/non-compliant clients
- What are the reporting/documentation requirements associated with a tax practitioner making a disclosure?

Recent Guidance Confirms Dangers with Inadequate Engagement Letters

- Why are appropriately drafted engagement letters so important in the new environment?
- What are the key clauses/issues that should be addressed in an engagement letter?
- What information needs to be included in an engagement letter where outsourcing (e.g., overseas) occurs?
- What should tax practitioners do when tax issues are found in a prior year for a new client?
- How should an engagement letter deal with tax issues from prior years?

Other Key Issues when Protecting your Practice

- Key TPB developments that will directly affect tax practitioners
- Traps and tips with professional representations on behalf of a client (e.g., sophisticated investor)
- Disclosures and obligations when an accounting practice is subject to a cyber attack
- Traps and tips associated with lodging overdue tax returns and BASs for a new client
- Dealing with the privacy laws including the storage of client data and information

An Essential Guide to Terminating a Client Engagement

- When is a tax practitioner legally required to terminate an engagement with a client?
- Navigating the issues associated with document liens and software access (e.g., Xero)
- Rights and obligations when recovering or settling outstanding accounts from a former client
- Documentation and notification requirements when terminating an engagement
- Dealing with historic claims and runoff cover for PI insurance purposes

Delegates receive important precedent documents:

Precedent documents provided include updated engagement letters (for businesses and individuals), sample file notes and termination documents.

Live Streaming on:

- ◆ **Friday 15 November at 10am AEDT and**
 - ◆ **Thursday 5 December at 12pm AEDT**
- with dedicated Question and Answer Time.**

**2.5 Hours
of CPD (including
1 hour of Ethics)**



Protecting your Practice: Managing client risk and future uncertainty

Members

◆ \$242 PDF Notes included (incl. GST)

Non-Members

◆ \$352 PDF Notes included (incl. GST)

All delegates will receive comprehensive PDF notes filled with examples and 2.5 Hours of CPD

Registration Form

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