



# 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.

## Completing this request

- ! All fields with an asterisk (\*) are mandatory
- Save this request form to your computer
- Complete the required fields on screen
- Save the completed request for your records
- After completing all sections email your request to [TaxPractitionerAssistance@ato.gov.au](mailto:TaxPractitionerAssistance@ato.gov.au)

## 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

! While it is not compulsory to provide your clients ABN or TFN, it will help us progress your request promptly. We are bound by the *Privacy Act 1988* in terms of collecting personal information and TFNs.

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## Section C: Request type

### 8 Request relates to (select one request type)\*

Administrative matter

Tax and superannuation law related matter

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## Section D: Matter requiring Tax practitioner assistance

### 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 where possible. 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](http://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 **must** be completed, otherwise it will **not** be accepted.

**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.