

Policy Statement – Code of Conduct

In our business we:

Uphold and adhere to being a “Professional Bookkeeper”

Uphold and adhere to the requirements of the ICB Professional Code of Conduct

Uphold and adhere to the requirements of the TASA2009 Code of Conduct for Registered BAS Agents (the Code)

Uphold and promote the ethical standards of the tax profession,

Comply with our personal and business tax and compliance obligations

To achieve this, in our business we:

- Have a Quality Management System.
- Undertake at least 30 hours per year of Continuing Professional Education.
- Provide training and resources to ensure we understand and apply the current business and compliance obligations for our clients.
- Provide training and resources to ensure we understand and apply the Code.
- Actively endorse, promote and require adherence to the Code.
- Have a culture of transparency, accountability, ethical conduct and compliance with the Code and the tax laws.

Our quality management system includes processes for:

- Our approach to providing services.
- Our approach to communication with Clients.
- Review of work performed.
- Supervision and control.
- Record keeping in relation to services provided.
- Recognition and required actions in relation to amending or correcting previous work, including any false or misleading statements to the ATO or other Government agency.

We specifically note that in accordance with the requirements of the Code, we uphold the principles of **Honesty and Integrity, Independence, Confidentiality and Competence**. We take reasonable care in ascertaining a client’s state of affairs and in ensuring that taxation laws are applied correctly to your circumstances in relation to the statements we are making on your behalf or the advice we are providing to you. We will advise you of your rights and obligations under relevant taxation laws.

We also advise that we advise you of any matter that could significantly influence your decision regarding our engagement to provide services.

Please also refer to our Disclosure Statement and Engagement Letter.