

E-Signature Process

Step 1

Document to Sign

Dear

Attached to this email is a copy of your completed income tax return for the year ending 2017. You will need to retain a copy of this return for the next five years.

Please review every page of the accompanying tax return to confirm that all items are true and correct and then electronically sign and submit the tax return back to us for lodgement.

Our tax estimate shows that you have an Amount refundable of _____ This has been calculated based on a taxable income of _____ and the information you have supplied to us. This is an estimate only.

Your tax return will be lodged electronically once we have received the signed and dated declarations.

A Notice of Assessment will be issued by the ATO confirming your taxable income and any amounts refundable or payable.

Your income tax refund (if any) will be deposited into your nominated bank account by the ATO.

If you have any questions or require further information then please do not hesitate to contact

Yours sincerely,



Review Documents

Click the Review Documents button

Not sure what to do next?

Watch [Signing Document Online](#) to see how to log into the Xero portal and e-sign your document.

Step 2

The image shows a screenshot of the Xero account activation process. At the top center is the Xero logo. Below it is a white form titled "Activate your account". The form contains the following elements: a heading "Activate your account", a sub-heading "Your password needs to contain at least 8 characters, including one or more numbers", a "Password" input field, a "Phone number" input field, a checkbox labeled "I have read and I accept the Terms of Use", and a blue "Activate your account" button. Four red arrows point from text boxes to these elements: 1. From the password field to a box stating "1. Create a one off password following the criteria located above the Password box". 2. From the phone number field to a box stating "2. Fill in your phone number". 3. From the terms of use checkbox to a box stating "3. The Terms of Use box must be ticked". 4. From the activate button to a box stating "4. Click the Activate your account button".

3. The Terms of Use box must be ticked

1. Create a one off password following the criteria located above the Password box

2. Fill in your phone number

4. Click the Activate your account button

Step 3

Xero Portal Logout

Individual Tax Return 2017

Options -

Declaration refers and confirm that all items are correct and that there are no omissions or misstatements.

Income:
If I am an Australian tax resident, you have advised me that I must declare income from all sources, in and out of Australia, including net capital gains received, for the year of income in my tax return.

Expenses:
You have advised me that to claim a work related or other expense deduction I must demonstrate that I have incurred the expense for income producing purposes. In addition, you have advised me of the substantiation legislation that I must satisfy in relation to all deductible expenses, including car, travel, business, education and work related expenses. You have informed me that I must OBTAIN ORIGINAL RECEIPTS and keep them for a minimum of five years from the date my return is lodged.

The receipts must contain the following details:

- name of supplier and amount of expense;
- nature of goods/services and date of the expenses (details I am able to personally record where not adequately noted by supplier);
- date of the document.

Apportionment:
Where items are used for both business/work related and private purposes e.g. car, telephone, computer etc. I advise I have kept appropriate apportionment records to verify my business usage claim and that my employer will verify that it was necessary to incur such expenditure in earning my income. Further, I have instructed you to prepare the return based on my specific instructions on the understanding I will be able to produce such information to the satisfaction of the ATO in an audit situation.

Audits:
I further confirm that:

- I am aware that the procedures to follow if a document is lost or destroyed is to obtain a copy from the supplier;
- I may be required to substantiate or verify any income or expense item declared or claimed in my tax return in the event of an ATO audit;

I declare that:

- I have read and understood the tax return that has been prepared for me;
- I have disclosed and you have returned all my assessable income for the current income tax year;
- I have all receipts or documentation necessary to substantiate my work related and other claims, and I will make them available if required by the Tax Office;
- All income declared, claims for deductions and tax offsets/rebates included in my return are based upon my specific instructions;
- You have explained what written income and expense evidence will typically be required during an audit and that penalties, interest and possible legal action may be applied if incorrect income or claims are identified by an audit.

Terms and Conditions:

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POWERED BY Adobe Sign

Once you have confirmed all the details on your return click the Start tab

Step 4

Click on the Click here to sign box

Xero Portal Logout

Options - Individual Tax Return 2017 3

- I am aware that the procedures to follow if a document is lost or destroyed is to obtain a copy from the supplier;
- I may be required to substantiate or verify any income or expense item declared or claimed in my tax return in the event of an ATO audit;

I declare that:

- I have read and understood the tax return that has been prepared for me;
- I have disclosed and you have returned all my assessable income for the current income tax year;
- I have all receipts or documentation necessary to substantiate my work related and other claims, and I will make them available if required by the Tax Office;
- All income declared, claims for deductions and tax offsets/rebates included in my return are based upon my specific instructions;
- You have explained what written income and expense evidence will typically be required during an audit and that penalties, interest and possible legal action may be applied if incorrect income or claims are identified by an audit.

Terms and Conditions:

- I acknowledge that an invoice will be issued for your services and I agree to pay this invoice in full.
- I acknowledge that full payment may be taken to secure payment of overdue/outstanding accounts.

Signature Date

Sep 21, 2017

Next

Individual Tax Return 2017 THIS FORM CANNOT BE LOADED AS A PAPER REPRESENTATION OF THE FORM Page 1 of 0

INDIVIDUAL TAX RETURN

Individual Tax Return™

1 Jul 2016—30 Jun 2017 2017
TFN Recorded

PART A ELECTRONIC LODGMENT DECLARATION (FORM I)

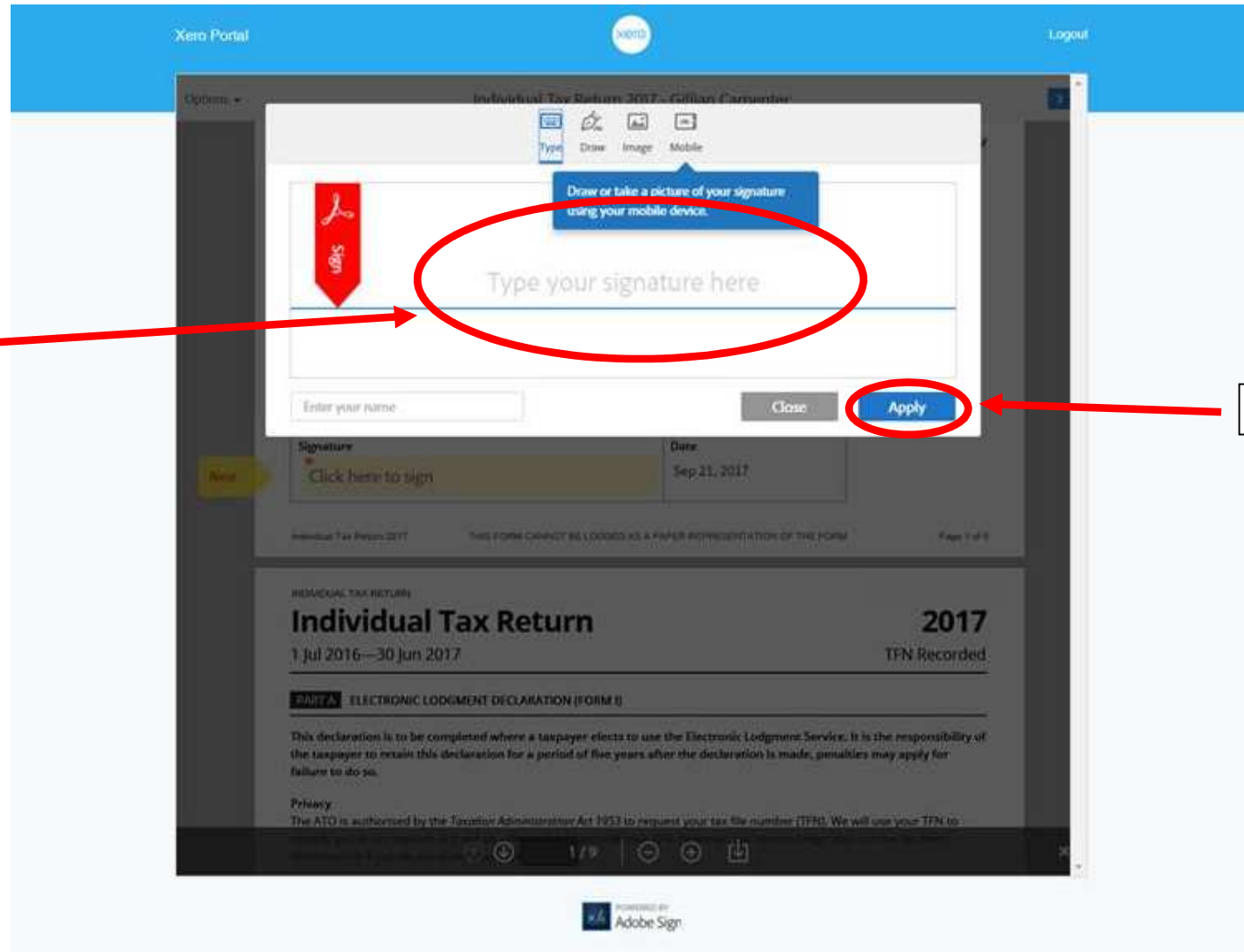
This declaration is to be completed where a taxpayer elects to use the Electronic Lodgment Service. It is the responsibility of the taxpayer to retain this declaration for a period of five years after the declaration is made, penalties may apply for failure to do so.

Privacy
The ATO is authorised by the Taxation Administration Act 1953 to request your tax file number (TFN). We will use your TFN to identify you in our records. It is your responsibility to ensure you provide your TFN to us electronically if you do not quote it.

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Step 5



1. Click & Type your signature

2. Click Apply

Step 6

Xero Portal Logout

Options - Individual Tax Return 2017 3

- I am aware that the procedures to follow if a document is lost or destroyed is to obtain a copy from the supplier;
- I may be required to substantiate or verify any income or expense item declared or claimed in my tax return in the event of an ATO audit;

I declare that:

- I have read and understood the tax return that has been prepared for me;
- I have disclosed and you have returned all my assessable income for the current income tax year;
- I have all receipts or documentation necessary to substantiate my work related and other claims, and I will make them available if required by the Tax Office;
- All income declared, claims for deductions and tax offsets/rebates included in my return are based upon my specific instructions;
- You have explained what written income and expense evidence will typically be required during an audit and that penalties, interest and possible legal action may be applied if incorrect income or claims are identified by an audit.

Terms and Conditions:

- I acknowledge that an invoice will be issued for your services and I agree to pay this invoice in full.
- I acknowledge that further action may be taken to secure payment of overdue/outstanding accounts.

Signature <i>Ring A Refund</i>	Date Sep 21, 2017
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Individual Tax Return 2017 THIS FORM CANNOT BE LOADED AS A PAPER REPRESENTATION OF THE FORM Page 1 of 9

INDIVIDUAL TAX RETURN

Individual Tax Return

1 Jul 2016—30 Jun 2017 **2017**
TFN Recorded

PART A ELECTRONIC LODGMENT DECLARATION (FORM I)

This declaration is to be completed where a taxpayer elects to use the Electronic Lodgment Service. It is the responsibility of the taxpayer to retain this declaration for a period of five years after the declaration is made, penalties may apply for failure to do so.

Privacy
The ATO is authorised by the Taxation Administration Act 1953 to request your tax file number (TFN). We will use your TFN to identify you in our records. It is not possible to identify you without your TFN. We will not disclose your TFN to any other person or organisation electronically if you do not give us your consent.

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Click the Next tab – this will take you to the next box to sign.

Click on the Signature box and your signature will come up

Click Next again until there are no more Next tabs to click

Step 7

Xero Portal Logout

Options ▾ Individual Tax Return 2017 Completed ✓

PART B ELECTRONIC FUNDS TRANSFER CONSENT

This declaration is to be completed when an electronic funds transfer (EFT) of a refund is requested and the tax return is being lodged through the electronic lodgment service (ELS).

This declaration must be signed by the taxpayer prior to the EFT details being transmitted to the Tax Office. If you elect for an EFT, all details below must be completed.


Important
Care should be taken when completing EFT details as the payment of any refund, including any family tax benefit, will be made to the account specified.


Agent Ref No. _____ Account Name _____

Authorisation
I authorise the refund to be deposited directly to the account specified.

Signature <i>Ring A Refund</i>	Date Sep 21, 2017
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I agree to the [Terms of Use](#) and [Consumer Disclosure](#) of this document


Click to Sign

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 Adobe Sign

Once all sections are signed a Click to Sign button will come up on the bottom of your screen – Click this

If you see the below you have successfully submitted your signed tax return

