Appointing SuperGuardian as Tax Agent for your SMSF



2023

Self-Managed Superannuation Funds are required to use the Client-agent linking nomination process to appoint a Tax Agent or update the authorisations granted to an existing registered agent. This process has been implemented by the ATO to enhance security measures and safeguard against fraud and identity related theft. The process ensures that only authorised tax agents can access client information and act on their behalf.

Key notes of the nomination process:

- New clients must nominate SuperGuardian as their tax agent via Online Services for Business before SuperGuardian can add them as clients and proceed with any services that require ATO online services.
- The nomination must be actioned by SuperGuardian before the expiration date. The agent nomination period is 28 days, effective from 13 November, 2023.
- If a nomination has expired, it cannot be extended; instead, a new nomination must be submitted. However, if the linking process cannot be completed before the expiry date you can apply to extend the time frame by seven days.
- The ATO's step by step client-agent linking process is on the proceeding page outlining how to nominate a tax agent.

For step by step instructions, please head to the SuperGuardian video, **Appointing SuperGuardian as Tax Agent for your SMSF**.

SuperGuardian Tax Agent Details

Registered Agent Number: 71800015 Practice Name: SuperGuardian Pty Ltd

Notifying SuperGuardian:

Once you've submitted your nomination, notify SuperGuardian that they are authorised to add your SMSF as a client (the nomination is active for 28 calendar days). We will not receive a notification about the nomination, so it's important you advise your Client Manager when it's been submitted.

Troubleshooting:

If unable to nominate using Online Services for business

Contact ATO to speak with a customer service representative.

- myGovID 1300 287 539 (option 2)

- Link your myGovID to RAM 1300 287 539 (option 3)

Before the ATO can discuss your details or update your records, they will ask you questions to verify your identity. They recommend you to have your tax file number (TFN) or Australian business number (ABN) ready when you phone them. Contact the ATO to speak with a customer service representative on 13 28 66.

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Online services for business

How to nominate an agent in Online services for business

Have you already set up access to Online services for business?

NO

YES

You must nominate your agent.

Your agent cannot do this for you, but they can guide you through the nomination process.

The security of your tax and super information is very important to us. That's why we've changed the process for how a registered agent (tax agent, BAS agent or payroll service provider) can access your information. We now require you to securely nominate a registered agent when you change an agent or change the authorisations you give your existing agent.

The flowchart and screen shots below will assist you to nominate your agent.

Set up your myGovID If you already have a myGovID Go to step 2

- Download the myGovID app
- Follow these instructions to set up your myGovID
- Choose either a Strong or Standard identity strength.

A *Strong* identity strength may mean you can complete **step 2** online instead of contacting us.

Important

Your myGovID is unique to you, using your personal information – you cannot share it with others.

Finished setting up your myGovID? Go to Step 2

Link your myGovID to your ABN in Relationship Authorisation Manager

If you have a *Strong* myGovID identity strength and your name is listed in the Australian Business Register you can link your ABN online by logging in to Relationship Authorisation Manager, selecting link my business and following the prompts.

- You'll need to contact us to complete this step if you:
- have a **Standard** myGovID identity strength
- are a primary person who's not listed as an individual associate in the Australian Business Register.

If your ABN is linked in Relationship Authorisation Manager, go to Step 3 Log in to Online Services for business

Use your myGovID to log in to Online services for business.

Go to Step 4

Nominate your agent in Online services for business

Important

You will need your agent's registered agent number for this step. Ensure your agent has provided this to you.

1 Tip: Refer to the screenshots on the next page to help you complete this step.

From the Online services for business home page:

- select Profile, then Agent details A
- at the Agent nominations feature, select Add B
- on the Nominate agent screen, go to Search for agent
- type your agent's registered agent number 📀
- check that the agent's details are correct D
- complete the **Declaration** and select **Submit** D
- you'll receive a nomination submission confirmation
- you'll see your agent's details listed under Agent nominations

If you have completed your nomination, go to Step 5

Tell your agent you've nominated them

Your agent **will not** receive an automated notification that you've nominated them, so it's important to let them know when you've completed this step.

You can provide your agent a copy of the nomination confirmation which you can print or save as a PDF.

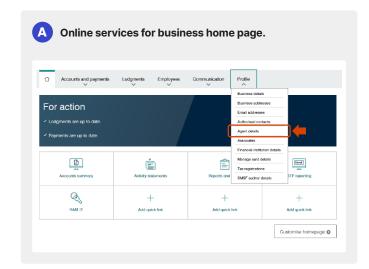
• Need help?

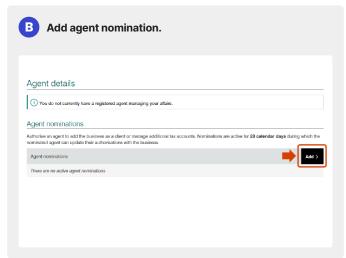
Contact us if you experience any errors while completing the agent nomination process. Before we can discuss your details or update your records, you must establish your identity.

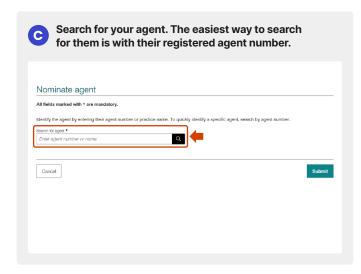
How to nominate an agent in Online services for business



The following screenshots will assist you to nominate your agent in Online Services for Business.







| Nominate age | minate agent | |
|---|--|--|
| All fields marked with * a | re mandatory. ng their agent number or practice name. To quickly identify a specific agent, search by agent number. | |
| Search for agent * | g and agont number of president tallion to queenly account a gont, search by agont number | |
| 87654321 | Q | |
| Name HAYES, HAZEL Agent number 87654321 Suburb/town ROSEVILLE State/territory | ← | |
| NSW Nomination expiry date 05/12/2023 | | |

