

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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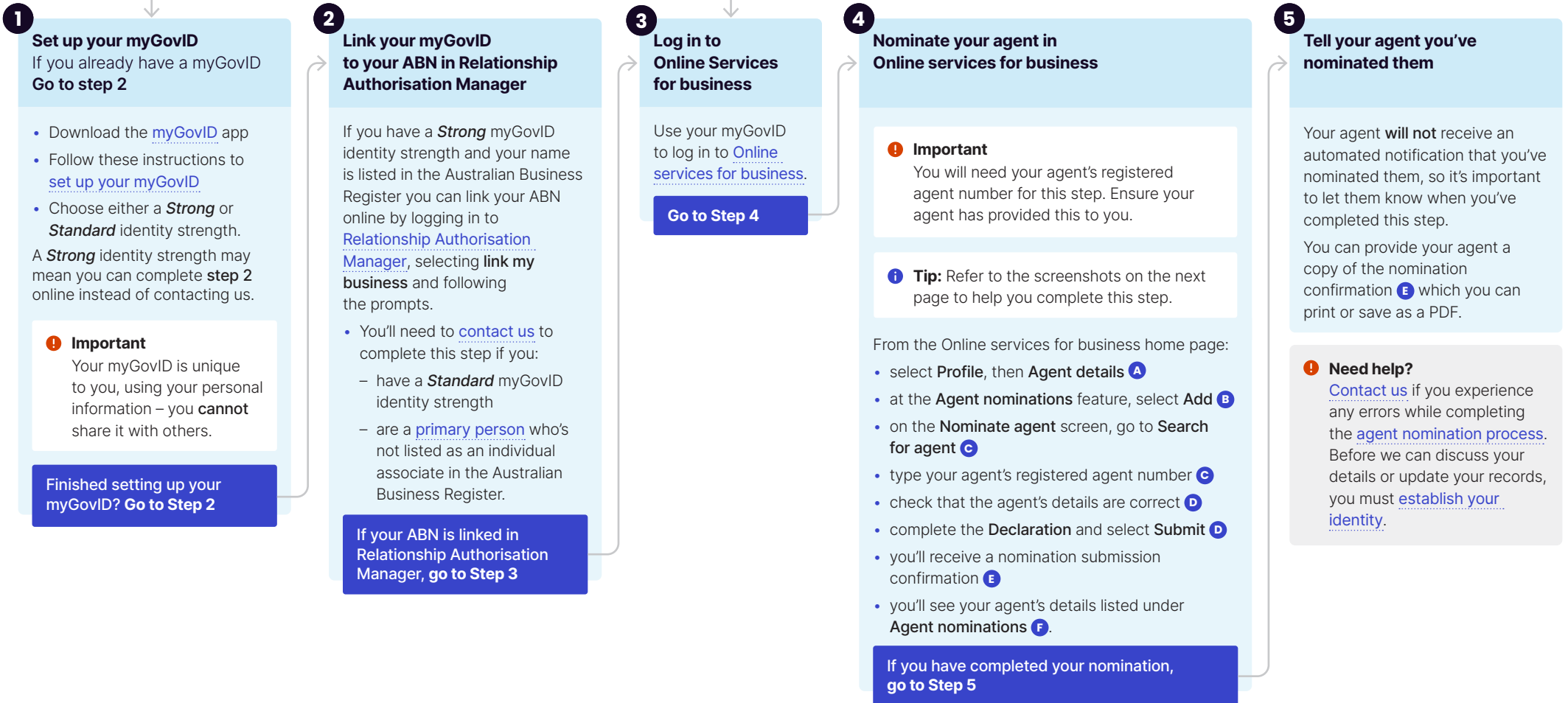


Online services for business

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.

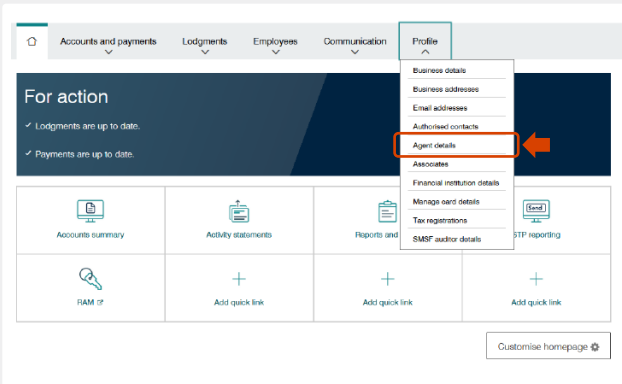
The flowchart and screen shots below will assist you to nominate your agent.

How to nominate an agent in Online services for business

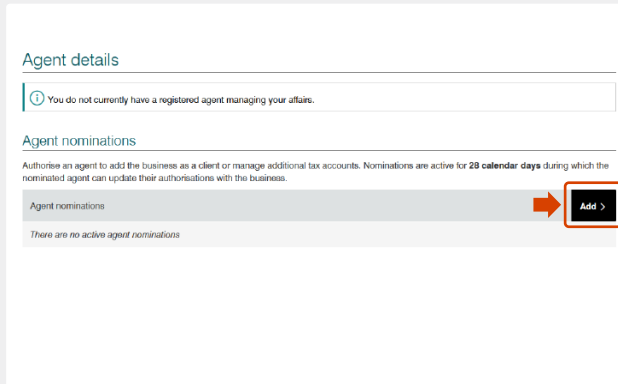


The following screenshots will assist you to nominate your agent in Online Services for Business.

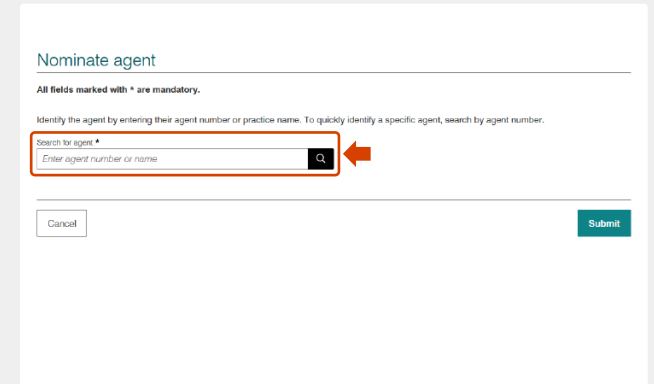
A Online services for business home page.



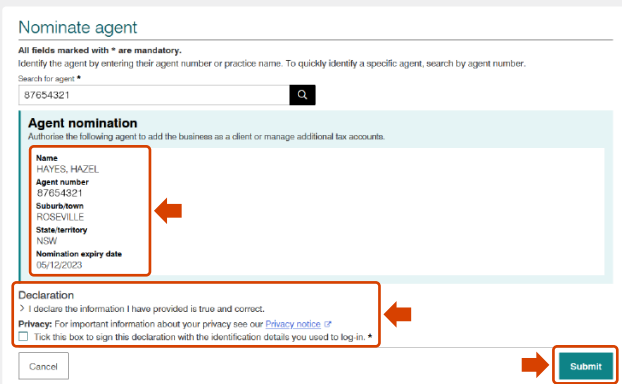
B Add agent nomination.



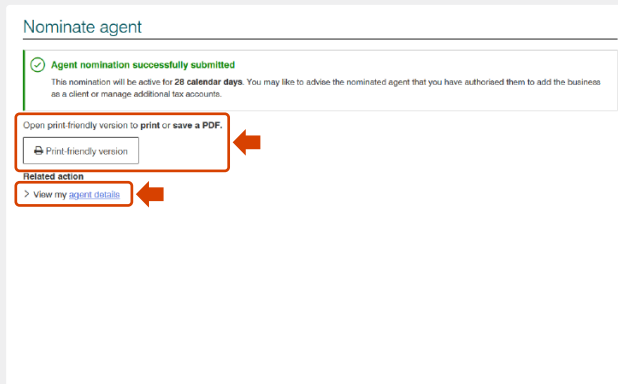
C Search for your agent. The easiest way to search for them is with their registered agent number.



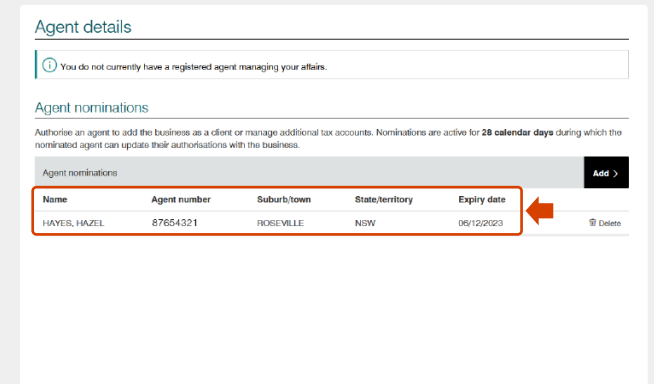
D Confirm details are correct, complete declaration and submit.




E Nomination submission confirmation. Notify your agent you have successfully nominated them.



F Agent details now listed under agent nominations.



 This is a general summary only.
For more information go to ato.gov.au/CALsteps