

Regulatory Disclosures

XTAS Pty Ltd (ABN 70 658 202 414), trading as XTAS Partners
Last updated: 15th September 2026

XTAS Pty Ltd (ABN 70 658 202 414), trading as XTAS Partners ("XTAS", "we", "us" or "our"), is committed to meeting its obligations under the *Tax Agent Services Act 2009* (Cth) ("TASA"), the Code of Professional Conduct administered by the Tax Practitioners Board ("TPB"), and the other laws and professional standards that apply to our practice. This page sets out information we are required to, or choose to, make available to current and prospective clients.

Tax agent registration

XTAS Pty Ltd is registered with the TPB as a tax agent, registration number 26371586. You can check our registrations on the [TPB public register](#).

Professional memberships

We are the member of Chartered Accountants Australia and New Zealand (CA ANZ) and holds a CA ANZ Certificate of Public Practice. Our work is subject to CA ANZ's by-laws and regulations, the standards issued by the Accounting Professional & Ethical Standards Board (including APES 110 *Code of Ethics for Professional Accountants*), and CA ANZ's quality review program.

Our obligations under the Code of Professional Conduct

As a registered tax agent, we must comply with the Code of Professional Conduct in TASA and the *Tax Agent Services (Code of Professional Conduct) Determination 2024*. Among other things, these require us to:

- act honestly and with integrity, and uphold the integrity of the tax system;
- act lawfully in the best interests of our clients;
- keep client information confidential unless disclosure is permitted or required by law;
- identify and manage conflicts of interest;
- provide services competently and maintain our knowledge and skills through continuing professional education;
- take reasonable care to ascertain our clients' state of affairs and to apply the tax law correctly;
- properly supervise the people who work for us and any arrangements with third parties;
- maintain professional indemnity insurance that meets TPB requirements; and
- keep clients informed of matters that could affect their decision to engage us, and of their own obligations under the tax law.

Your responsibilities as our client

When you engage XTAS Partners, you agree to:

- give us accurate, complete and timely information;
- keep proper records and retain them for the periods required by law;
- respond promptly to our requests for information;
- review everything we prepare for you before it is lodged or signed;
- meet your obligations under the tax law and related laws, including superannuation guarantee and employer obligations where they apply to you; and
- not give false or misleading information to us or to any government agency.

If these responsibilities are not met, we may be unable to act for you, or may need to end our engagement. Under the self-assessment system, you remain legally responsible for the accuracy of your tax affairs.

Disclosure of prescribed matters

- there are no conditions imposed on the registration of XTAS Pty Ltd or its supervising registered tax agent;
- no disciplinary action or sanction has been taken against us by the TPB; and

- no prescribed events have occurred within the past five years that could reasonably influence your decision to engage us.

If a matter we are required to disclose arises, we will update this page and notify affected clients within the timeframes required by the Code of Professional Conduct.

Complaints

If you are unhappy with any aspect of our service, please contact us first so we can look into it. We will acknowledge your complaint within 5 business days and aim to respond within 30 days. If your complaint relates to a tax agent service and is not resolved to your satisfaction, you may complain to the TPB. Information about the TPB's complaints process is available at tpb.gov.au.

Privacy

We handle personal information in accordance with the *Privacy Act 1988* (Cth) and our Privacy Policy, which explains how we collect, use, disclose and protect your information.

AML/CTF reporting entity

XTAS Pty Ltd is enrolled with AUSTRAC as a reporting entity under the *Anti-Money Laundering and Counter-Terrorism Financing Act 2006* (Cth). As a result, we must:

- maintain an AML/CTF Program;
- verify the identity of our clients and their beneficial owners and representatives;
- screen clients against sanctions lists and for politically exposed person status, at the start of an engagement and on an ongoing basis;
- keep records for at least seven years after a client relationship ends; and
- report certain matters to AUSTRAC.

These obligations affect the information we ask you for, and there may be circumstances in which we cannot begin or continue an engagement. The law may prevent us from explaining why. Further details are provided in our Engagement Terms and Conditions when you engage us.

Professional Standards Scheme

Our principal, Keith Sun CA, participates in the Chartered Accountants Australia and New Zealand Professional Standards Scheme, approved under the *Professional Standards Act 1994* (NSW) and equivalent legislation in other states and territories.

Liability limited by a scheme approved under Professional Standards Legislation.

More information about professional standards schemes is available from the Professional Standards Councils at psc.gov.au.

Language

We serve clients in English and Mandarin. Where this page is provided in Chinese, the translation is for convenience only and the English version prevails.

Further information

The TPB publishes information explaining your obligations to the ATO and to your tax practitioner, and our obligations to you, the TPB and the ATO. It is available at tpb.gov.au, and we can provide a copy on request.

Contact us

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