Dear [Previous Bookkeeper]

I/We have been approached by [Authorised Contact Name of Client Business Name and ABN] to engage our bookkeeping/BAS services from [date].

Please advise if there are any professional or ethical reasons why we should not accept this appointment.

If there are no ethical barriers to me/us providing services to [Client Business Name], please provide the following information to ensure the efficient continuity of professional services.

We would appreciate receiving a handover report and any relevant documentation you may hold. Please let me/us know if you require a handover checklist template for this purpose.

[Provide AAT Handover Checklist to outgoing bookkeeper if required].

Once we have received all relevant information to provide professional services, we will notify the Australian Taxation Office of our authority to act on the client’s behalf.

Please do not hesitate to contact me if you have any questions or wish to discuss any matters.

Yours sincerely,

[Your name]

[Your business details]

[BAS agent number]

[AAT or IPA member number]