



# The Professional Bookkeeper

## **The Professional Bookkeeper: A Guide to Our Role and Standards**

At Boox – The Bookkeeping Experts, we are committed to delivering accurate, ethical, and compliant services tailored to your business needs. This guide outlines the core principles, standards, and values we uphold as professional bookkeepers and BAS Agents.

### **Our Role**

As your professional bookkeeper, our role includes:

- **Recording Financial Data:** Accurately capturing, processing, and maintaining your financial transactions.
- **Compliance:** Ensuring your records meet the requirements set by the Australian Taxation Office (ATO) and other regulatory bodies.
- **Reporting:** Delivering clear, timely, and actionable reports to support your business decisions.
- **Advice:** Providing insights and recommendations on your financial health within our scope of expertise.

### **Our Standards**

#### **Adherence to TASA2009 Code of Conduct**

As a registered BAS Agent, we comply with the Tax Agent Services Act 2009, which requires us to:

- Act honestly and with integrity.
- Maintain confidentiality of your financial information.
- Exercise due care and diligence in all services provided.
- Ensure appropriate knowledge and skills for the work we undertake.
- Account for all client monies accurately.

#### **Membership with the Institute of Certified Bookkeepers (ICB)**

- Being an ICB member ensures that we:
- Stay informed about current laws, industry changes, and best practices.
- Access continuing professional education to enhance our skills.
- Uphold a strict professional code of conduct.



## **How We Work**

- Our processes are designed to streamline your financial operations while maintaining compliance:
- Collaboration: We work closely with you and your accountant to ensure consistency and accuracy.
- Technology-Driven: Leveraging leading software like Xero, Approval Max and Dext for efficient bookkeeping and reporting.
- Transparency: Keeping you informed of your financial position with regular updates and detailed reports.
- Customization: Tailoring our services to meet the specific needs of your business.

## **Our Commitment to You**

- We are insured with Professional Indemnity Insurance, safeguarding the services we provide.
- We prioritize accuracy, compliance, and confidentiality in everything we do.
- We are always available to address your queries or concerns, offering clarity and confidence in your financial management.

## **Why Choose a Professional Bookkeeper?**

- Engaging a professional bookkeeper ensures:
- Reduced risk of errors and penalties.
- Up-to-date compliance with tax laws and regulations.
- Greater focus on growing your business while we handle the numbers.

If you have any questions or need more information, feel free to reach out. Let's work together to keep your business finances in control and stress-free!