

Appointing HUB24 as tax agent for your SMSF

In this fact sheet, we will cover steps required to appoint HUB24 Management Services Pty Ltd as your fund's tax agent.

Only 1 Trustee/Director is required to complete the following steps. These steps can be completed once your welcome letter to HUB24 SMSF Access has been issued.

1. Link the ABN of your SMSF to your newly created myGovID (new funds only, existing funds go straight to step 2)

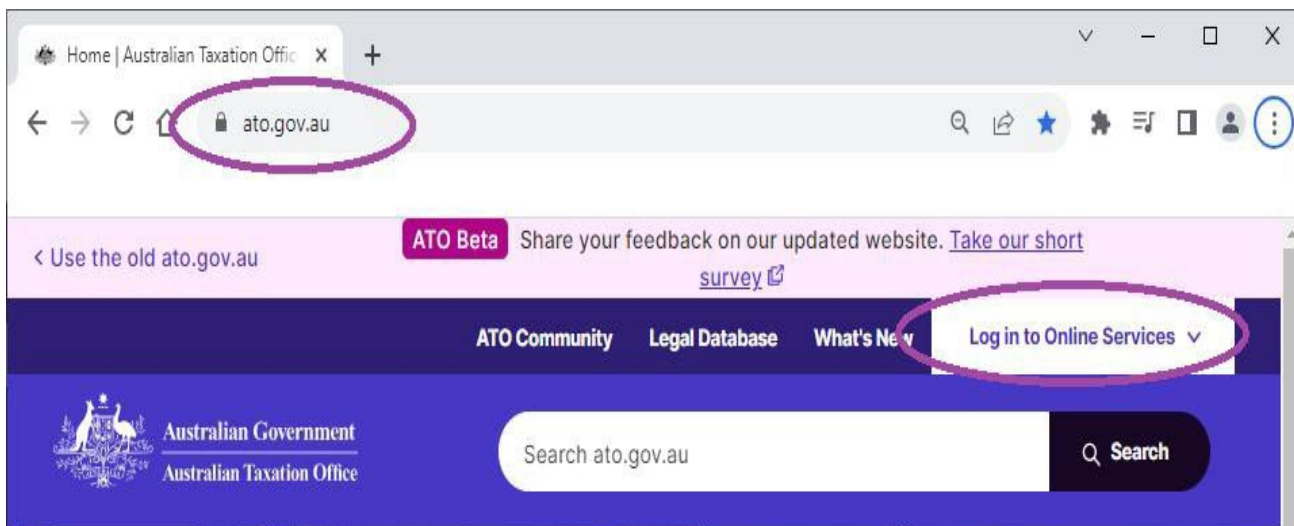
To complete this step online, you **MUST** have achieved Strong identity strength on your myGovID.

- i. Log in to Relationship Authorisation Manager (RAM) with your myGovID: <https://info.authorisationmanager.gov.au/>
- ii. Select Link my business
- iii. Input your residential or postal address (that the ATO has on record for the ABN)
- iv. Enter an email address and send verification email
- v. Verify email
- vi. Review the summary of the selected business and tick the declaration box

If needed, the ABN of your SMSF can be found on InvestorHUB, or by contacting your adviser.

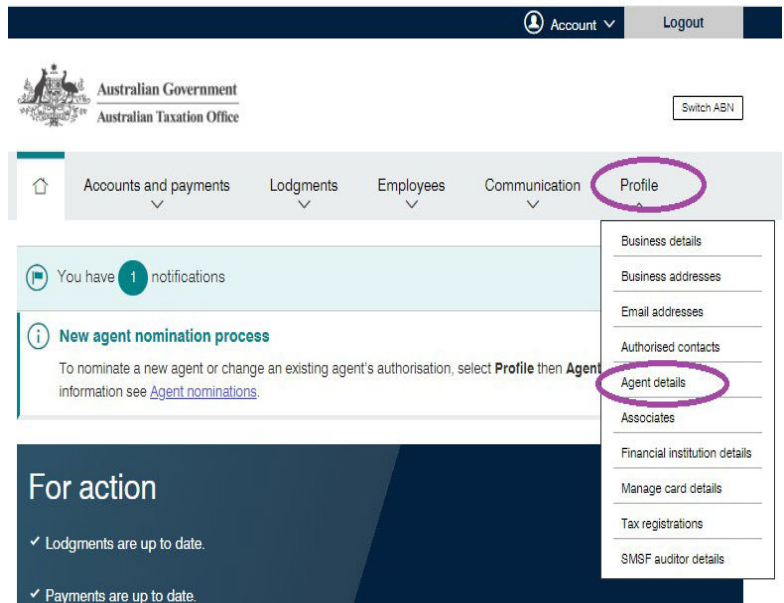
2. Nominate HUB24 Management Services as you authorized tax agent

- i. Navigate to <https://www.ato.gov.au/> and Use your myGovID to Log in to Online Services (Business)



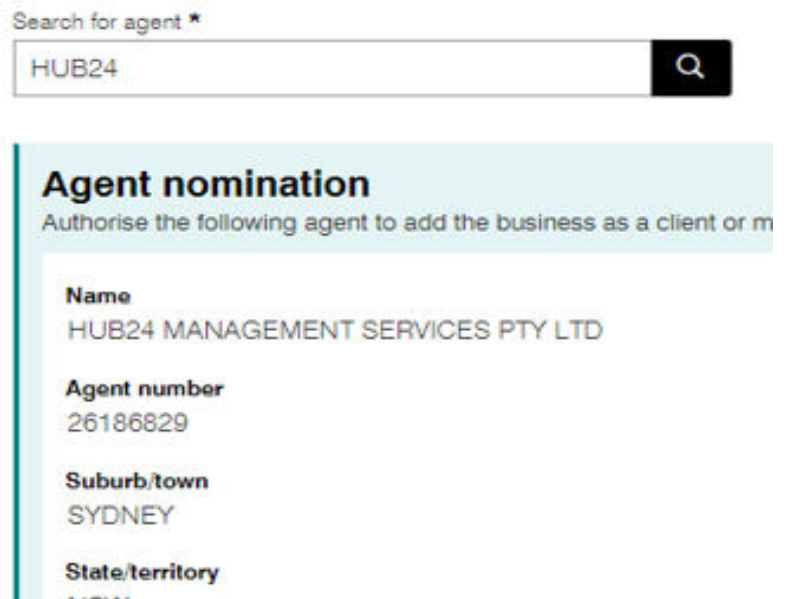
ii. From the Online services for business home page:

1. Select Profile, then Agent details
2. At the Agent nominations feature, select “Add”
3. On the Nominate agent screen, go to Search for agent



HUB24 Management Services agent details:

4. Search “HUB24 Management Services Pty Ltd” in the search field
5. Check that the agent's details are correct
6. Complete the Declaration
7. Select Submit.



2. Once completed, your adviser MUST notify HUB24

As the ATO does not automatically notify us of your nomination, it is important your adviser emails us once this has been completed so we can action it. They can do this by emailing admin@hub24.com.au with your account number and indicating that you have nominated HUB24 as the tax agent for your SMSF.

3. Additional Support

If you're having difficulty with any of the above steps, please see the points below for further assistance. Alternatively, please contact your advisers for assistance.

- **myGovID help:** For further information/help with applying for your myGovID, please view the myGovID website for more information/helpful tips. <https://www.mygovid.gov.au/>
- **Relationship Authorisation Manager (RAM):** For further information/help with linking your ABN, please view the RAM website for more information/helpful tips. <https://info.authorisationmanager.gov.au/>
- **Tax agent appointment help:** For further information/help with nominating HUB24 Management Services Pty Ltd as your tax agent, please view the ATO website for more information/helpful tips. <https://www.ato.gov.au/online-services/businesses-and-organisations-online-services/agent-nomination-process#ato-Abouttheagentnominationprocess>

General Advice Warning

The information in this document is intended to be general information only and not financial product advice. It does not take into account your individual objectives, financial situation, needs or circumstances. Accordingly, the viewer should consider the appropriateness of the information, having regard to their objectives, financial situation and needs. Before you make any decision about whether to acquire or continue to hold a financial product or an investment available in the financial product, you should consider the relevant disclosure document and it is recommended you obtain professional financial advice tailored to your personal circumstances, from your financial adviser. Past performance is not indicative of future performance. No representations or warranties express or implied, are made as to the accuracy or completeness of the information contained in this document. To the maximum extent permitted by law, neither HUB24 nor its directors, employees or agents accept any liability for any loss arising in relation to this document.

Important Information

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The logo for HUB24, featuring the word "HUB" in a bold, white, sans-serif font, followed by the number "24" in a smaller, yellow, sans-serif font. The logo is positioned in the upper right corner of a dark blue background that features a stylized silhouette of a person's head and shoulders.