



## Client to Agent Linking


These instructions are to assist with the process of nominating Kelly & Associates as your agent, to allow us to act on your behalf in relation to taxation matters. The nomination process must be completed for each of your business entities. Please advise us when the nomination process is complete. If you need assistance please contact our office on (03) 5224 1022.

The nomination process requires access to **Online Services for Business**:

- If you **do not** have access to Online Services for Business proceed to **Step 1**.
- If you **do** have access to Online Services for Business proceed to **Step 3**.

**Steps 1 & 2** must be completed by a [principal authority](#) for the business. The principal authority is a person who is responsible for the business, such as a trustee, director, public officer or partner. The person must be listed as an associated individual on the ABN in the Australian Business Register (ABR).

### Step 1: Set up Digital Identity (myID)

- Download the myID app 
- Enter your details including your full name, date of birth and a personal email address
- Enter proof of identity documents to create a **strong** identity strength. You will need:
  - an Australian passport, and one of the following;
  - a birth certificate, citizenship certificate, driver licence or medicare card.

### Step 2: Link your myID to your ABN

- Login to [Relationship Authorisation Manager](#) using your myID
- Select **Link your business** and follow the prompts to select the business or businesses to link
- If any business entity **does not have an ABN**, or you are otherwise **unable to link online**, please contact the ATO on **1300 287 539** and select **Option 3** for assistance with the linking process. To contact the ATO you will need myID set up with at least **standard** identity strength.
- **Note that a business entity without an ABN and without a Tax File Number, such as a trustee company, does not need to be linked**
- Further [linking assistance](#) is available here.

### Step 3: Login to Online Services for Business

- Login to [Online Services for Business](#) using your myID.

### Step 4: Nominate Kelly & Associates

From the **Online Services for Business** home page:

- Select **Profile** then **Agent Details**
- At the **Agent Nominations** feature select **Add**
- On the **Nominate Agent** screen go to **Search for Agent**
- Enter agent number **68362002** and select **Search**
- Confirm the details for **Kelly & Associates**, complete the **Declaration** and select **Submit**
- **Repeat** the nomination process for each of your business entities.

### Step 5: Notify Kelly & Associates

Please notify us when the nomination process is complete by contacting our office on (03) 5224 1022 or [reception@kellyassoc.com.au](mailto:reception@kellyassoc.com.au). We won't receive any other notification so it is important to let us know so we can action the nomination before the 28 day expiry period.