

Tax Agent interview questions

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What to expect

Interviews for tax agent roles check three things: whether you're actually registered and current on the law, whether you can hold up under the seasonal workload, and how you handle clients when the news or the ATO's position isn't what they wanted. Expect a mix of technical checks and judgement calls, especially around what you'd do when a client pushes for a deduction you're not comfortable with.

- **Process:** Questions asking you to walk through how you'd actually handle a return or a client file, step by step.
- **Behavioural:** Past-experience questions about workload management, deadlines and client relationships during peak periods.
- **Regulatory/technical:** Questions checking your registration status and how you keep current with tax law and ATO rulings.
- **Scenario/ethical:** Judgement questions about handling a client request that sits close to the line on deductions or disclosure.
- **Client-facing:** Questions about explaining outcomes to clients, particularly when the result isn't what they expected.

Most interviews open with a check on your TPB registration and qualifications, move into a couple of technical or process questions to confirm you know the compliance work cold, then shift into scenario and behavioural questions about workload and client handling. They usually close with your questions about the firm's client base and how they manage the seasonal peak.

1. Walk me through how you'd handle a complex individual return with multiple income sources and several deduction claims.

Why they ask

This checks your actual process for compliance work rather than just your knowledge of the rules in the abstract.

How to structure your answer

Walk-through: describe the sequence from initial client information gathering, through checking substantiation for each deduction, to reconciling income sources and final review before lodgement.

Example answer

"I'd start by getting all income statements and source documents together, then check each deduction claim against what the client can actually substantiate, since that's where most reviews start if something goes wrong later. I'd reconcile any business or investment income separately, flag anything that looks unusual against prior years, and do a final check in Xero Tax before lodging. If anything's borderline I'd rather raise it with the client before lodgement than after."

2. Tell me about a time you had to manage a heavy caseload during tax season without letting quality slip.

Why they ask

Tax time creates a sharp seasonal peak, and firms need to know you can sustain accuracy under that volume.

How to structure your answer

STAR: set out the situation and the volume of work, the task you were responsible for, the action you took to prioritise and stay accurate, and the result.

Example answer

"During the July to October peak I was carrying a full caseload of individual and small business returns at once. I prioritised files by lodgement deadline and set aside blocks of time for the more complex business returns so they weren't rushed. I also flagged early with clients whose paperwork was incomplete, so I wasn't chasing documents at the last minute. I got through the peak without missing a deadline and without any returns needing to be amended afterward."

3. How do you keep current with changes to tax law and ATO rulings?

Why they ask

Tax law changes regularly, and a registered agent has an ongoing obligation to stay current under TPB requirements.

How to structure your answer

Direct explanation: describe your sources, your routine for reviewing updates, and how you translate changes into client advice.

Example answer

"I follow ATO updates and practice statements directly rather than relying on secondhand summaries, and I check for legislative changes at the start of each financial year before advising clients on structures or deductions. When a ruling affects existing client positions, I go back through affected files and update the advice rather than waiting for the next return to catch it."

4. A client asks you to claim a deduction you don't believe is legitimate. What do you do?

Why they ask

This tests your judgement under pressure and your understanding of your professional and legal obligations as a registered agent.

How to structure your answer

Judgement under pressure: explain how you'd weigh the client relationship against your regulatory obligations, and what you'd actually say and do.

Example answer

"I'd explain to the client directly why I don't think the claim meets the deduction rules, and what the risk is if it's flagged in an ATO review. If they insisted, I'd document that I'd advised against it, but I wouldn't lodge a return I believed contained a claim I couldn't support. Registration with the TPB means my name is on that return, so I'm not willing to put through something I think is wrong."

5. How would you explain to a client why their refund is lower than last year?

Why they ask

Client-facing communication matters as much as technical accuracy, particularly when the outcome disappoints them.

How to structure your answer

Communication approach: describe how you'd frame the explanation, what evidence you'd point to, and how you'd manage the client's reaction.

Example answer

"I'd walk them through the specific changes between the two years, whether that's a change in income, a deduction that no longer applies, or a shift in tax law, rather than just stating the final number. I'd show them the comparison so they can see exactly where the difference came from, and if there's anything they can do differently for next year, I'd raise that too."

6. Describe how you'd prepare for and handle an ATO review on behalf of a client.

Why they ask

Representing clients in ATO reviews is a core part of the role and tests your documentation habits and composure dealing with the regulator.

How to structure your answer

Walk-through: outline the preparation steps, the documentation you'd gather, and how you'd manage direct contact with the ATO.

Example answer

"I'd start by pulling together every piece of substantiation for the items under review, checking it against what was actually lodged. I'd contact the client to confirm details and fill any gaps before responding to the ATO, rather than reacting straight away. When corresponding with the ATO I keep it factual and evidence-led, since that's what actually resolves a review, and I keep the client updated at each stage so they're not caught off guard."