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## **Strategy & Tax**

We Do More Than Crunch The Numbers... Our Tax Expertise With A Strategic Edge



## Management of your Compliance and Red Tape Obligations

We document the whole picture of your structure and provide recommendations.



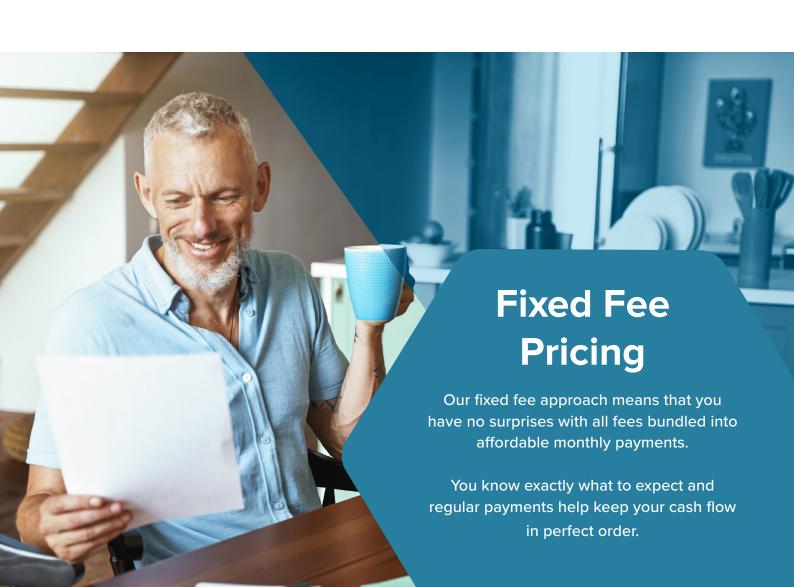
## Proactive Meetings that include goal setting, tax planning, and annual general meetings

Align your financial strategies with your business and personal goals and set yourself up for a prosperous future.



## **Support and Accountability**

We provide varying levels of online and priority support, as well as accountability checkins to ensure you're on track with your goals beyond just the taxes



We have three packages that you can choose from and any number of add-ons that you can select to improve your business. We are a Xero practice so all of these packages are priced based upon use of Xero only. In order to build model and extract the information we need, we do not use other accounting programs because they are managed and priced in a different way.

If you don't have Xero and are thinking of making the change, chat to us about your Xero Migration options.

BEEGROUP	ENGAGE FROM \$350 PER MON TH	PERFORMANCE FROM \$550 PER MONTH	STRATEGY FROM \$990 PER MONTH
Services (Deliverables)			
Initial Onboarding	$\odot$	$\bigcirc$	$\bigcirc$
Initial Tax Review	$\odot$	$\odot$	$\bigcirc$
Cash Basis Bookkeeping	Quarterly	Your Bookkeeper	Your Bookkeeper
Quarterly BAS Review & Lodgement	Quarterly	Your Bookkeeper	Your Bookkeeper
Profit & Loss Balance Sheet	Quarterly	Quarterly	Monthly
Business Performance & Management Report	Annually	Quarterly	Monthly
Smart Strategies (Group)	$\odot$	$\otimes$	$\bigcirc$
Smart Strategies (Tailored)	$\odot$	$\otimes$	$\bigcirc$
EOFY Financials	$\odot$	$\otimes$	$\bigcirc$
EOFY Tax Returns	$\odot$	$\otimes$	$\bigcirc$
Review of Taxation Structure		$\otimes$	$\bigcirc$
Annual ASIC Compliance & Corporate Registry	$\odot$	$\bigcirc$	$\bigcirc$
Compliance Monitoring	Quarterly	Quarterly	Monthly
Tax Planning	Lite	Lite	Complete
Support	Priority	Priority Support	Premium



For more information, please visit our website.