

# 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 check-ins to ensure you're on track with your goals beyond just the taxes



## **Fixed Fee Pricing**

Our fixed fee approach means that you have no surprises with all fees bundled into affordable monthly payments.

You know exactly what to expect and regular payments help keep your cash flow in perfect order.

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.**

	<b>ENGAGE</b> <small>FROM</small> <b>\$350</b> <small>PER MONTH</small>	<b>PERFORMANCE</b> <small>FROM</small> <b>\$550</b> <small>PER MONTH</small>	<b>STRATEGY</b> <small>FROM</small> <b>\$990</b> <small>PER MONTH</small>
<b>Services (Deliverables)</b>			
Initial Onboarding	✓	✓	✓
Initial Tax Review	✓	✓	✓
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)	✓	✓	✓
Smart Strategies (Tailored)	✓	✓	✓
EOFY Financials	✓	✓	✓
EOFY Tax Returns	✓	✓	✓
Review of Taxation Structure		✓	✓
Annual ASIC Compliance & Corporate Registry	✓	✓	✓
Compliance Monitoring	Quarterly	Quarterly	Monthly
Tax Planning	Lite	Lite	Complete
Support	Priority	Priority Support	Premium



**For more information, please visit our website.**