

Menu of Services



Incorporating:



Ashfield Taxation Services

Tax Advantage

Books Advantage

Accounts Advantage

Business Advantage

Head Office:
93 Smith St.
SUMMER HILL NSW 2130

T: 9922 5477

F: 9799 3732

E: tax@advantagepartners.net.au

E: books@advantagepartners.net.au

E: business@advantagepartners.net.au

Level of services

LEVEL

1



The Compliance Packages

Professional assistance to help your business comply with the myriad of Government forms and regulations. Services by **Tax Advantage & Books Advantage** include bookkeeping, personal & business tax returns, financial statements, business activity statements.

LEVEL

2



The Plus Packages

Gain control and direction in your business and personal financial affairs. **Tax Advantage & Business Advantage** helps prepare the essential management tools to help you make informed decisions. We actively assist you in interpreting your periodic reports that monitor key performance indicators. Plus a personal financial health check by **Tax Advantage**.

LEVEL

3



The Business Development Package

Grow your business for financial independence and peace of mind. **Business Advantage** performs a detailed personal financial analysis and planning consultation, and an activity-based costing and/or management assessment of your customer base and business processes. We guide you through a 12-24 month business development program designed to increase company profits and business value, and build less reliance on the owner's daily input.



<Level 4 One-off Advice & Projects

Take advantage of our specialised services to help solve other common issues that your business may face. Special projects include accounting system upgrades, business startup and/or valuation services, succession planning, estate planning, superannuation, perhaps even just payslip compliance.

Choosing your level of services

Advantage Partners is proud to offer our clients the freedom to choose their own preferred services.

To choose the services you would like to receive, take the following simple steps:

- 1 Review the following menu of services.
- 2 Review each service offered, and then mark an “x” in the “Service Desired” column.
- 3 In the column under “Level of Interest” rank each service by circling 1-3 (1 = low, and 3 = high)
- 4 Return this Menu to us by.....

We will quote you a fixed price on your preferred services . You know where you stand. With a fixed price agreement you can call us at any time for advice on these matters with the knowledge that we will not be charging for phone calls (subject to change should the call require follow-up work or research). Anything outside the fixed price agreement will be quoted to you separately.

Of course, an hourly rate service is equally available. Just tell us which you’d prefer.

Menu of Services

LEVEL

1



The Compliance Packages

service
desired
x

level of
interest

1=low 3=high

- | | 1 | 2 | 3 |
|--|---|---|---|
| 1. Web-based basic bookkeeping. Everything up to bank reconciliation stage, suitable for BAS and tax return lodgement. | | | |
| 2. On-site bookkeeping. Everything up to bank reconciliation stage, suitable for BAS and tax return lodgement. | | | |
| 3. Attending to Tax Office inquiries, audits. Liaising with all other government departments on your behalf. | | | |
| 4. Maintaining employee records, including personal leave records, long service leave records, TFN declarations, super choice, super guarantee | | | |
| 5. Preparing end of year PAYG summaries, lodging Annual PAYG Summary with ATO | | | |
| 6. Reconciling debtors, preparing invoices, ordering stock | | | |
| 7. Prepare unaudited financial statements. Provide adjusting journal entries as may be required. | | | |
| 8. Preparation and lodgement of business activity statements | | | |
| 9. Lodgement of business activity statements from client-supplied or bookkeeper-supplied information | | | |
| 10. Monthly or Quarterly Profit & Loss Reports | | | |
| 11. Monthly or Quarterly Reports on Tax, BAS, superannuation & other compliance payments due | | | |
| 12. Periodic updates about changes to the law, or changes to your | | | |

LEVEL

2



The Plus Packages

**service
desired
x**

**level of
interest
1=low 3=high**

-
1. Everything in the *All Compliance Package*, as well as:

 2. Tax Advice on demand – when you want it 1 2 3

 3. Business Advice on Demand – when you want it 1 2 3

 4. Proactive Advice & Suggestions about tax or business growth 1 2 3

 5. Budget, Cash Flow and/or Forecasting Reports. Monthly or Quarterly 1 2 3

 6. Quarterly Performance meetings. Review budgets, cash flows, KPIs, business plan milestones 1 2 3

 7. Pre Year end Business tax planning review 1 2 3

 8. Comparisons to industry statistics, where available. 1 2 3

 9. Checklists, reminders, timetables 1 2 3

 10. Identify and begin to track key performance indicators 1 2 3

 11. Annual profit improvement potential calculation to review business potential & increase profits using the Four Ways to Grow a Business 1 2 3

 12. Conduct an annual planning session for key managers to set an action plan and goals for the coming year. 1 2 3

 13. Please tell us how we can help you manage your business better 1 2 3

.....

.....

LEVEL

3



Business Development Package

**Service
desired
x**

**level of
interest
1=low 3=high**

1. Everything in the *Compliance Packages* and the *Plus Packages*, as well as:

.....

2. Business Coaching. Being a mentor

1 2 3

.....

3. Strategies to lessen your day-to-day input, & free up time to work on your business, not in it.

1 2 3

.....

4. Prepare detailed financial analysis and planning consultation, based on the completion of our Questionnaire and analysis of income and spending

1 2 3

.....

5. Perform activity based costing and/or management assessment of customer base and routines. Set up key performance indicators to monitor profitability and less reliance on owner daily input, and financial/operational reporting routines for staff to prepare.

1 2 3

.....

6. Prepare a limited calculation of estimated business value

1 2 3

.....

7. Assist with re-engineering the business. Commence with analysis of strengths, weaknesses, opportunities & threats using our 48-page Business Development questionnaire

1 2 3

.....

8. Lead management team through the Business Development Programme, a nine stage, 12 to 24 month process designed to increase company profits and business value.

1 2 3

.....

9. Please tell us how we can help you expand your business

1 2 3

.....

.....

.....



- | | | | |
|--|---|---|---|
| 1. Prepare a written business plan for use with bankers and shareholders. | 1 | 2 | 3 |
| 2. Apply for State and/or Federal government business grants or incentives. | 1 | 2 | 3 |
| 3. Training you in understanding financial reports. Our Advanced Financial Management programme helps you interpret and use financial reports. | 1 | 2 | 3 |
| 4. Assistance with obtaining bank or other financing, including cash or profit projections. | 1 | 2 | 3 |
| 5. Assist with business startup. Includes a checklist as a tool to guide on everything to be considered. | 1 | 2 | 3 |
| 6. Examination or Valuation of possible business acquisitions. | 1 | 2 | 3 |
| 7. Fixed price business compliance assessment to identify the strengths and weaknesses of the company's income tax and other business compliance . | 1 | 2 | 3 |
| 8. Fixed price business health assessment to identify the strengths and weaknesses of key financial and non-financial indicators. | 1 | 2 | 3 |
| 9. Succession planning to ensure the continued success of your business. | 1 | 2 | 3 |
| 10. Setup or conversion to Banklink. Assistance with upgrades, on-site training of new staff members. | 1 | 2 | 3 |
| 11. Review of owner salary/package to achieve most tax effective outcome. Includes personal financial health check | 1 | 2 | 3 |
| 12. Review tax effectiveness of fringe benefits, including cars & superannuation. | 1 | 2 | 3 |
| 13. Setup of self-managed superannuation fund, or effectiveness review of | 1 | 2 | 3 |

existing fund (excludes investment advice)

- | | | |
|---|--------------------------|-------|
| 14. Arranging asset of equipment finance, having regard to whether leasing, asset purchase, CHP is best for you, as well as competitive rates. | | 1 2 3 |
| 15. Arranging property finance, whether for home or investment, from a wide panel of lenders, at competitive rates. | <input type="checkbox"/> | 1 2 3 |
| 16. Arranging mortgage reviews and insurance reviews. Worth doing every couple of years to see how much can be saved if your loan is outdated or uncompetitive. | <input type="checkbox"/> | 1 2 3 |
-