



Menu of Services



Tax Advantage

Books Advantage

Business Advantage

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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 WorkChoice 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.

Menu of Services

LEVEL 1  The Compliance Packages	service desired x	level of interest <i>1=low 3=high</i>
1. Tax Advice on demand – when you want it	<input type="checkbox"/>	1 2 3
2. Business Advice on Demand – when you want it	<input type="checkbox"/>	1 2 3
3. Basic Bookkeeping at your premises or ours. Everything up to bank reconciliation stage.	<input type="checkbox"/>	1 2 3
4. Attending to Tax Office inquiries, audits. Liasing with all other government departments on your behalf.	<input type="checkbox"/>	1 2 3
5. Attending to administration matters such as payment of salaries, WorkChoice payslips, superannuation, payroll tax, Business Activity Statements, ASIC, worker’s compensation insurance, etc	<input type="checkbox"/>	1 2 3
6. Maintaining employee records, including lodgement of AWAs, personal leave records, long service leave records, TFN declarations, super choice, super guarantee	<input type="checkbox"/>	1 2 3
7. Reconciling debtors, preparing invoices, ordering stock	<input type="checkbox"/>	1 2 3
8. Preparation and lodgement of annual income tax returns for sole trader, partnership, trust or company structure	<input type="checkbox"/>	1 2 3
9. Prepare unaudited financial statements. Provide adjusting journal entries as may be required.	<input type="checkbox"/>	1 2 3
10. Preparation and lodgement of business activity statements	<input type="checkbox"/>	1 2 3
11. Lodgement of business activity statements from client-supplied or bookkeeper-supplied information	<input type="checkbox"/>	1 2 3
12. Periodic updates about changes to the law, or changes to your responsibilities	<input type="checkbox"/>	1 2 3

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. Budget or Cash Flow Reports. Monthly or Quarterly

1 2 3

.....

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

1 2 3

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4. Pre Year end Business tax planning review

1 2 3

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5. Comparisons to industry statistics, where available.

1 2 3

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6. Checklists, reminders, timetables

1 2 3

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7. Identify and begin to track key performance indicators

1 2 3

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8. Annual profit improvement potential calculation to review business potential & increase profits using the Four Ways to Grow a Business

1 2 3

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9. Conduct an annual planning session for key managers to set an action plan and goals for the coming year.

1 2 3

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10. Please tell us how we can help you manage your business better

1 2 3

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11. 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

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<Level 4 Menu>

service
desired
x

level of
interest
1=low 3=high

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