

# HOW WE CAN HELP YOU



## Accounting

- Financial accounts preparation
- Bookkeeping
- Cloud based accounting
- Accounting software selection
- Cashflow forecasting
- Budgeting
- Management accounting



## Tax Compliance

- Income tax compliance - individuals, companies, trusts, partnerships, SMSFs
- GST management
- Preparation of Activity Statements - BAS / IAS
- Self Managed Superannuation Funds
- Fringe Benefits Tax (FBT)
- Payroll Tax
- Stamp Duty
- Land Tax
- Management of ATO audits or disputes



## Tax Advice

- Business structures and restructures
- Capital Gains Tax (CGT)
- Rental Property - purchasing, tax minimisation and ownership structure
- Tax-effective structures
- Asset protection
- Exit strategies
- Business succession planning
- Specialist taxation advice
- Tax risk management



## Business Management

- Due diligence for business acquisitions and mergers
- Periodic budget reporting and analysis
- Forecasting projected profit and loss, balance sheet and cash flow statements
- KPI development, reporting and analysis
- Breakeven and profitability analysis
- Banking and funding reviews
- Developing and implementing strategic business plans
- Business improvement strategies



## Succession & Estate Planning

- Asset protection strategies
- Technical advice on complex income tax, GST and CGT concessions in the event of restructure
- Succession planning and exit strategies
- Support in administration of deceased estates
- Life insurance and superannuation
- Planning for retirement
- Advice on pension eligibility



## Superannuation

- SMSF Consultancy
- SMSF Audit Services
- SMSF Administration and Compliance
- Pension Strategies and Advice
- Estate Planning
- SMSF Taxation Advice



## Investments

- Direct Shares
- Property
- Managed Funds
- Alternate Investments



## Insurance

- Income Protection
- Life
- Total Permanent Disability
- Trauma
- Blood Borne Illness / Needlestick



## Financial Planning

- Loans
- Insurance
- Investments
- Cashflow & Budgeting
- Debt Restructuring
- Savings



## Loans

- Home Loans
- Investment Properties
- Business Finance
- Equipment Finance
- Property Finance
- Motor Vehicle Finance
- Commercial Property Loans
- Novated Leases
- Personal Loans
- Special Banking Packages



## Medical Practice Management

- Accounting & Taxation
- Finance & Banking
- Due Diligence
- Billing & Medicare
- Information Technology
- Real Estate & Property
- Business Management



## Other Services

- Corporate Secretarial Duties
- Trust Administration
- ABN, TFN & GST registration
- Depreciation reports
- Property management
- Property research data
- Workers compensation
- Motor vehicle buying advice, broker and finance
- Salary packaging



## Medical

- Accounting
- Tax Compliance & Advice
- Lending
- Insurance
- Salary Packaging
- Practice Management

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