

## Proactive Accounting Meeting - Outline and Benefits

### Why we developed this service.

It's important to spend time working **on** your business, not just **in** it. Taking time out to discuss what's happening in your business will provide clarity of your future direction. A Proactive Accounting Meeting gives you the opportunity to meet with us on a no charge, no obligation basis to discuss the following:

- Your goals for your business and how you plan to achieve them
- How your business goals tie in with your personal and lifestyle goals
- Issues and challenges you are facing in your business, e.g. growth, cashflow, succession, etc.
- How you can work with us to address these

It's also a great opportunity for us to share how we can assist you in the future. For example, would you like to know more about our strategies to help you grow your wealth, profitability and cashflow? Would you like help improving your efficiency and effectiveness?

### Who should have a meeting?

If you're keen to improve your business performance and financial results and feel like you are not currently being supported to achieve this, then contact us. We firmly believe that we can help you and, more importantly, we want to!

### What is involved?

You'll have a complimentary consultation with a senior team member to review your unique situation and discuss how we can support you in the most appropriate way. Following the meeting, if required, we will prepare a proposal for services with all costs priced upfront.

### When should I have a session?

We recommend that you arrange your Proactive Accounting Meeting with us as soon as possible in order to identify immediate strategies to improve your financial position.

*Why put off until tomorrow what you can achieve today!*

**Call us now on 0414877781 to book your Proactive Accounting Meeting.**



## Benefits of a Proactive Accounting Meeting

- Review and establish your goals and strategies for achievement
- Identify your burning issues and opportunities
- Assess your current business structure
- Stimulate strategic discussion of the current and future direction of your entities
- Identify how we can assist you to achieve your goals through the growth and protection of your assets
- Gain access to our collective wisdom and advice for your unique situation
- Identify the key drivers of your business
- Potentially identify greater tax efficiencies
- Gain a better understanding of your business
- Understand our service offerings and how they can benefit you
- Gain certainty about our fees, with upfront pricing for proposed work