

# Proactive Accounting Meeting - Outline

## Why did we develop this service?

We believe it is important to spend time working **on** your business, not just **in** it. It is important to take time out to discuss what is happening in your business, so you have clarity about your future direction. This meeting gives you an opportunity to meet with us on a no charge / no obligation basis to discuss any of the following:

1. Your goals for your business and how you plan to achieve them.
2. How your business goals tie in with your personal and lifestyle goals.
3. Issues and challenges you are facing in your business e.g. growth, profitability, cashflow, asset protection, or your planned exit from, or sale of, your business.
4. How you can work with us to address these issues and plans.

It is also a good opportunity for us to share with you how we can give you the assistance that you need. For example, would you like to know more about our strategies to help you grow your wealth, profitability and cashflow? Would you like help with improving your efficiency and effectiveness?

## Who should have a meeting?

If you are keen to improve your business performance and financial results and don't feel you are currently being supported to achieve this, then please contact us.

We firmly believe that we can help you and we want to do this! By having a Proactive Accounting Meeting you can have access to us at no cost to you.

## What is involved?

You will have a free consultation with a senior team member to review your unique situation and discuss how we can support you in the most appropriate way. In order to make the meeting as productive as possible and tailored to your requirements we ask you to complete a short questionnaire and provide your last annual financial reports prior to the meeting. Following the meeting, if required, we will prepare a proposal for services, with all costs priced upfront.

## When should I have this meeting?

We recommend that you arrange to have a 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 09 421 9020 to book your Proactive Accounting Meeting**

## Benefits of a Proactive Accounting Meeting

- An opportunity for you to review your goals and strategies for achievement
- Helps you better understand your business
- Helps us understand the key drivers of your business
- Identifies your burning issues and opportunities
- Gives you access to our collective wisdom and informed advice specific to your unique situation
- Assesses your current business structure
- Identifies greater tax efficiencies
- Stimulates strategic discussion affecting the current and future direction of your entities
- Identifies areas where we can assist you to achieve your goals through the growth and protection of your assets
- Gives you an understanding of our services and how they can benefit you
- Gives you certainty about your fees, as you will receive upfront pricing on any work proposed by us