SUPERIOR ACCOUNTING SOLUTIONS
—Thinking Outside The Numbers—

Account-Ability 4 Achievement
PROFESSIONAL PROPERTY **INVESTOR** PACKAGES

	PREMIUM PACKAGE From $ **149** / Month Incl. GST	**EXECUTIVE** PACKAGE From $ **360** / Month Incl. GST
✓ ***Getting advice when you need it*** We offer 30 minutes of phone advice a year, so that you get the answers you need when you need it.	30 minutes annually	30 minutes annually
✓ ***Preparation of Tax Returns*** We prepare the tax returns for you, and provide proactive advice to help enhance your investment journey.	2 individuals annually	2 individuals annually
✓ ***Maximise your Depreciation Entitlements*** We ensure that for each investment property you are maximising your depreciation claims each and every year.	2 properties annually	2 properties annually
✓ ***Tax Deductions Detector*** We comprehensively analyse your deductions to ensure that you claim all the tax deductions that you are legally entitled to claim.	Ongoing	Ongoing
✓ ***Calculation of the annual cost of holding each investment property*** We will perform this calculation each year for each property and advise you of the cost of holding that property both before tax and after tax which enables you to make informed decisions on the performance of each investment property that you hold.	2 investment properties	2 investment properties
✓ ***Maintenance of capital gains tax records*** We will prepare a capital gains tax purchase summary for any properties purchased during the year, this will ensure that when you sell the property you have access to the purchase documents to calculate the capitals gains tax on sale.	New Investment Property	New Investment Property
✓ ***Tax Planning*** We will assist you to calculate the potential capital gain and to minimise any capital gains tax when you actually sell an investment property.	As Needed	As Needed
✓ ***Finance letter*** We will prepare for you one finance letter each year as required by your broker or lender.	1 finance letter annually	1 finance letter annually
✓ ***Helping Bullet proof you from ATO audit*** We will provide you with the appropriate advice and substantiation tools and documents to assist supporting deductions claimed.	As Needed	As Needed
• **Preparation of your Investors Budget** o We work with you to prepare your annual budget.		1 annual budget
• **Amendments to your Investors Budget** o We work with you to process amendments to your annual budget.		1 annual budget
• **Reports, Graphs & consultation explaining your Investors numbers to you** o We prepare graphs and a report to help explain the numbers to you.		1 annual budget
We are committed to partnering with you on your financial journey, to make you **Account-Able** for your **Achievements** (AA4A)		
If you have 5 invetsments please refer to point 4.	5 Investments	

Please turn over for Terms and Conditions

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ACCOUNTANTS WHO LOVE THE NUMBERS 4 YOU

TERMS & CONDITIONS:

1. There has only been TWO investment properties included in this Package; any additional property is priced at $27.50 per month, including GST.
2. Information is provided in one of the following formats:
   - Utilising our Tax Data Collection form and / or
   - An Excel spreadsheet file containing summarized / totaled data.
   - Xero data file
   - Drop box
3. Investment Property – the depreciation has been calculated using a quantity surveyor's report.
4. The Package allows for 5 investment trades, ie. buying/selling/options/CFD's/Managed Funds. Anything over this would therefore incur an additional charge.
5. No consideration has been allowed for any sole trader business nor properties owned in a Trust.
6. Amendment to prior years' tax return/s are not included in this fee estimation.

8. No consideration has been allowed for unknown events that may have transpired globally such as company mergers which affect your shares, changes in ATO rulings, ATO audit requirements, etc.
9. We have assumed that we are NOT preparing a "Capital Acquisition Statement" for any investment properties you currently own. Your previous Accountant should be able to provide you a copy to forward on to us. This document will have been used to ascertain purchase costs and borrowing costs for your property to ensure that you receive all legal deductions you are entitled to. If borrowing costs have never been claimed in your Tax Returns, you may well have been missing out on money you were entitled to.
10. Amounts per Month: The work for the financial year 20XX will be paid for by the end of 30th June 20XX. Eg. If you sign up in December 20XX then the monthly amount for an individual would be $368.57 for 7 months and then change to $215.00 per month for the next financial year.
11. Packages have their annual fee paid monthly over the current financial year. For all subsequent years your package will be renewed at the end of the current financial year. At no stage during this agreement period will there be any reimbursement for fees paid.