

Getting to know each other is the first and most important step in assessing your accounting needs. Here, we will discuss what goals and objectives you want to achieve from running your business, the work that needs to be completed and what you want from your accountant. You will also get to know us better, and you may ask questions at this stage about our areas of expertise, background and qualifications, how often you'll need to meet, most importantly the costs.

Getting to know each other

Quote and Engagement

Based on what we know about you, your goals and your current compliance requirements, we will put together a quote which will detail all of the work which we will undertake and the fee proposal.

We will gather all of the information we require from you to prepare the accounts. We will let you know what we need by giving you a checklist so that you can ensure you have everything together so that we can prepare the accounts for you in a timely and cost effective manner.

Preparation of Accounts

Review and planning meetings

Review meetings can take place as often as you feel necessary whether it be monthly management meetings, quarterly catch ups to coincide with BAS lodgements or annually to prepare end of year accounts with ad hoc meetings as you require. These meetings are a great way to review the previous periods performance and access our knowledge to put plans in place for the future.

We will stay in touch and make sure you are aware of any changes that may affect you through videos, seminars and newsletters and of course through phone calls and emails. The accounting landscape is no longer a retrospective space. In order to make the best decisions we will work with you to keep your accounting data up to date so that decisions can be made confidently and quickly.

Education and informaton

