



Proactive Accounting Meeting - Outline

Why we developed this service?

We believe it is important to spend time working **on** your business, not **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 make more money, pay less tax or improve your lifestyle? Would you like help with improving your efficiency and effectiveness?

Who should have a review?

If you are keen to improve your business performance and financial results and don't feel your current accountant is supporting you to achieve this, then please contact us.

We firmly believe that we can help you more AND we want to do this! By having a Pro-active Accounting Meeting you can have access to us at no cost to you.

What is involved?

You will have a free 60 minute consultation with an experienced QAL team member, reviewing your unique situation, and discussion around 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.

When should I get a review?

We recommend that you arrange to have a Pro-active 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 07 308 4414 (Whakatane) or 07 578 6069 (Tauranga) 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 understand your business better
- Helps us understand the key drivers of your business
- Identifies your burning issues and opportunities
- You have access to collective wisdom of Quay Accountants and informed advice
- You will receive an assessment on your current business structure
- It is an opportunity for you to identify greater tax efficiencies
- Stimulates strategic discussion affecting the current and future direction of your entities
- Identifies areas where Quay Accountants can assist you make more money, pay less tax and improve your lifestyle
- Gives you an understanding of Quay Accountants' services and how they can benefit you
- You will have certainty about your fees, as you will receive upfront pricing given on any work quoted by us