

## Proactive Accounting Meeting

*We enjoy helping our clients (and potential clients) to develop, improve and grow their businesses.*

We believe it's important to spend time working *on* your business, not *in* it. Taking time out to discuss what is happening in your business allows you to gain clarity about your future direction. That's where we come in.

We offer a complimentary **Proactive Accounting Meeting** to non-clients to explore how we can best help you. 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 or challenges you're facing in your business e.g. cashflow, growth, asset protection, profitability, or how you plan to exit or sell your business.
4. How we can work with you to address these issues and plans.

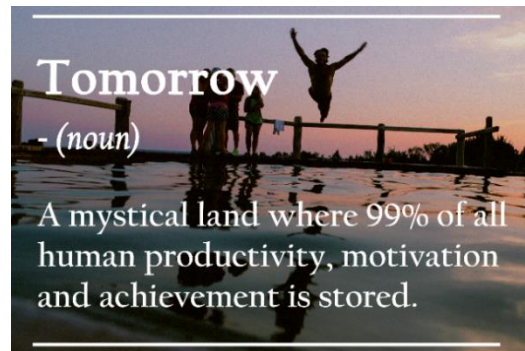


This complimentary meeting is a great opportunity for us to share with you how we can give you the assistance you need to achieve your family, business and personal goals.

**Call us today** to learn about strategies that we've developed to help you to grow your wealth, profitability and cashflow.

### Benefits of a Proactive Accounting Meeting:

- Review your goals and strategies for achievement
- Discuss and gain understanding of the key drivers of your business
- Identify your burning issues and opportunities
- We'll assess your current structure
- Potentially identify greater tax efficiencies



- Stimulate strategic discussion around your current and future direction
- Identify where we can assist you to better protect and grow your assets
- Understand our range of services and how they might benefit you
- Gain access to our collective wisdom and informed advice

Prior to your Proactive Accounting Meeting, you'll complete a quick questionnaire and provide your latest annual reports. This will ensure the meeting is productive and relevant to your individual circumstances.

Then you'll meet with a senior team member who'll review your unique situation, define some key goals and strategies to achieve them and discuss how you might like us to support you going forward.



Following the meeting (if appropriate) we'll prepare a proposal with upfront pricing for any services that you may be interested in.

**If you're keen to improve your financial results but don't feel you're currently receiving the support you need, [call us today](#).**