

Dear Valued Client

RE: NEW CLIENT INFORMATION

Thank you for engaging us to assist with your taxation and financial requirements. Where possible we will suggest **proactive** measures to assist you manage your affairs.

We thought it might help to explain a few details so that you know what to expect from our organisation.

1. At the end of each financial year, we will enclose a checklist to help you to organise your personal tax information. If the details are readily available before we meet you this increases the likelihood that we can **prepare your return promptly and efficiently** for you at a **lower cost**. We can also spend more time on specific questions or problems you may have relating to tax, financial or investment related matters.
2. Where possible we try to complete personal income tax returns while you wait.
3. More difficult returns, or those where some details are not yet available, are either posted out or we can call you when they are ready.
4. The Australian Taxation Office provides the option of having your refund credited *directly* to your bank account. We need to know whose name(s) the account is in, the BSB number and account number. Please bring evidence of these account details (e.g. a passbook, cheque book, bank statement), if you wish to make use of this service.
5. We lodge tax returns electronically via computer and assessments and refunds generally issue within 14 days of lodgement.
6. The tax office will send your Assessment Notice to our address. We will check all calculations and forward this on to you the same day.
7. Parking is available at the front of the office on Osmond Terrace.
8. Our fees are usually billed once the tax return or job is completed and our payment terms are 7 days.

Predominately, fees are calculated **based on the time spent**, at the following rates:

Proprietor	\$205 p/h
Senior Accountant	\$160 p/h
Assistant Accountant	\$105 p/h
Junior Accountant	\$ 90 p/h

An average tax return for an individual with salary/wages, interest and work related deductions would be approximately \$160 + GST. **However more complicated returns will take longer and hence cost more.** Likewise telephone calls or discussions relating to more complicated issues will also be charged on a time basis. Please feel free to ask for quotation of costs in relation to your specific circumstances at your appointment.

As our **fees are based on time spent** you can help to keep our fee down by being organised. We hope our checklist helps.

We offer the convenience for our fees to be deducted from your tax refund. Please feel free to discuss the matter further with your tax consultant during your appointment or contact our accounts department.

We look forward to assisting you in all your endeavours. Should you have any queries in the meantime, please do not hesitate to contact our office during working hours.

Yours faithfully
H.T.A.A.

STEVEN LY
PROPRIETOR