

SUPERFUNDS

- Report to ATO for contributions received by Superfunds
- Organise Audit (excluding external Audit Fees)
- Superannuation Taxation administration requirements

ADMINISTRATION SERVICES INCLUDED

- Superannuation Contribution Analysis
- Telephone calls unlimited
- Meetings unlimited
- Electronic Lodgement of Tax Returns
- Assessment checking and delivery/postage to client
- Photocopying, faxes, post, stationery and file maintenance

COMPANIES

- Preparation of Dividend Statements
- Change of Director/Secretary
- Change of Registered Office
- Allotment of Shares
- Transfer of Shares (excluding Stamp Duty)
- Change to Memorandum and Articles (excluding Legal Fees)
- Preparation and Electronic Lodgement of Company Annual Return
- Company Statutory Reports including Directors Report & Directors Statement
- Directors and Members minutes as required
- Updating Corporate Registers
- Registered Office fees
- Other minutes as necessary for taxation or corporation requirements

TRUSTS

- Trust Distribution Minutes
- Prepare Trust Elections
- Franking Credit Ceiling Election
- Prepare Trustee Minutes
- Maintenance of Trust Records
- Review of Trust Deed (excluding Legal Fees)

Western BD are continually looking for ways to improve your business systems and profitability.

To help you reach your goals we offer business seminars on a regularly basis.

We cover such topics as:

Business Growth
Profitability
Product/Industry Knowledge
Excellent Systems
Analysis Of Results
Cash Control
Stock Management
Work In Progress Control
Debtor Control
Cost Control
Staff Management, Motivation And Communication

This is just a small sample of what we cover in our seminars, if there are any topics you would like to cover please feel free to let us know, we always welcome input from our clients.

Should you wish to register for one of our seminars please visit our website or feel free to contact the office to discuss your requirements.

NB: Please note that all of our packages can be adjusted to suit your individual needs.

WESTERN BD

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FIXED PRICE MENUS

Bronze

SERVICES WE OFFER:

- Initial Appointment/Interview.
- Initial interview for documents required for completion of tax returns and financial statements
- Attention to rollover of previous years data
- Adjusting journal entries
- Discussion with fellow accountant concerning Quality Assurance compliance
- Compliance check for minimising tax legally
- Discussion with client for final approval
- Financial Statements Finalised, printed and bound
- Tax Returns prepared
- Preparation and Lodgement of Quarterly BAS
- Contact client for signing, collection of records
- Meetings unlimited
- Telephone calls unlimited
- Electronic Lodgement of Tax Returns
- Assessment checking and deliver/postage to client
- Photocopying, faxes, post, stationery and file maintenance
- We will review your financial performance at the end of a pre-determined period in order to provide you with taxation planning advice before the end of the year. Action taken here will allow us to pro-actively plan for your wealth creation strategies utilizing your retained after tax profits.
- Information and registration for any of the following: PAYG, GST, ABN, PAYG Instalment, PAYG Withholding, Payroll Tax, Fringe Benefits, Tax File Number.
- Superannuation Contribution Analysis.
- Bank Link Charges Included
- Quarterly Financial Statements and Monthly Reports
- Regular Meeting with Directors with Appropriate Report
- Annual Review of your Financial Status

Silver

ALL FEATURES IN THE BRONZE PACKAGE

PLUS:

- Assistance in setting and monitoring KPI's
- Monthly review of actuals against budget
- Review, train and monitor the 5 cash drivers,
 1. Debtors
 2. Creditor
 3. Stock Control
 4. Cost of goods sold
 5. Overheads
- Analysis of current market and where the competition is at within the same parameters of your target market. (i.e. price comparisons, service quality)
- Priority Access to all newsletters, circulations, and informative circulars.
- Introduction to Business Planning.
- Monthly Management Meetings to monitor finances and profitability
- In the Silver Service we endeavour to gain an in-depth understanding of your business and the main issues that need addressing. It is an ideal forerunner to embarking on the Gold service as it allows both parties to evaluate and gain a greater understanding of each other.

Gold

ALL FEATURES IN THE SILVER PACKAGE

PLUS:

BUSINESS DEVELOPMENT

This is where we are involved in assisting you with the development of your goals for business growth.

Your investment in our Gold Package includes a strategic planning session, the first step in our comprehensive business development process.

Our aim is to help you make your business even more profitable and therefore a more valuable asset.

We will review your corporate structure and review the responsibility of each individual.

We will oversee the development of your companies policies and procedures.

We will enter into discussions with your key people to identify the strengths and weaknesses of the company, we then analyse the information given and develop a plan to ensure success.

There will be a mutually agreed time table for each step of the plan and we will do a review on a monthly basis to ensure that we are reaching our goals.

Business plans are designed to ensure that you get the best out of your business. The development of a comprehensive business plan with meaningful, goals, targets and KPI's is seen as a key feature of the Gold Service.