

# TheFieldGroup.Accounting

## Fixed Price Service Agreements

**We're delighted to offer you this NEW way of working together!  
For an up-front agreed monthly amount, we will provide you with these services**

### 12 Month Cash Flow Projection & Profit Plan



We will work with you to set profit and cash flow targets for the next 12 months. You will have peace of mind knowing exactly the income your business needs to cover its outgoings.

### FREE Accounting Software



The world's easiest accounting system

You will receive access to XERO as part of this package. XERO is an online accounting system designed for business owners to work with their accountants, business partners and staff, all in real time.

XERO is designed to help you manage your business and cashflow better – over the internet. There is no software to install, and it's no hassle to set up. XERO simply allows you to get on with your business, and not have to worry about accounting.

### Quarterly & Annual Financial Statements



We will prepare your Financial Statements each quarter – forming the basis for your Quarterly "On-Track" Review.

### Quarterly "On-Track" Review



Each quarter we will meet with you (at our office or over the phone) to review all key areas of your business, compare actual results against targets, and revise strategies to keep your business moving forward.

### Business Activity Statements (BAS)



We will prepare and lodge all of your Business Activity Statements each quarter, and keep you fully informed of due dates for payments.

### Annual Needs Review



Each year we will review your individual and business needs using a pre-set Agenda to ensure that your Asset Protection, Estate Planning, and Wealth Creation needs are met.

### Year End Tax Planning Review



In the final quarter of the tax year, we will review your year-end tax planning options, and meet with you to discuss your Action Plan to legally save tax.

### Tax Returns



We will prepare and lodge all of your Business and Individual Tax Returns, and provide you with a Tax Payments Schedule to keep you on track.

### Annual ASIC Company Review



We will prepare and lodge your annual Company Review for your Companies (ASIC fees NOT included).

### Unlimited Telephone and e-mail Access



We want you to stay in touch with us. You can ring or e-mail us any time for advice in the knowledge it will not cost you any extra (limit of 10 min per phone call, some advice may require further research at an additional up-front fee).

### Key Advantages of this Proposal

1. Peace of Mind – Everything is taken care of!
2. Fixed monthly fee – You can easily budget for this.
3. XERO Accounting system will make your life so much easier.
4. We can work closer together throughout the year to:
  - **GROW** your business and assets
  - Improve your **CASH FLOW** and **PROFITS**
  - **PROTECT** your business and family assets
  - Plan for your **BUSINESS SUCCESSION** and **ESTATE PLANNING**

**If you are interested in a  
Fixed Price Service Agreement  
please contact your  
Client Manager on 9727 6700**