

Financial Health Check Packages

Package 1: Basic Tax Return and Financial Planning Review / Commentary Report

\$1,500.00 inc GST

Includes preparation of 2 basic tax returns and review/commentary of 2 of the areas below:*

- Review of existing superannuation policies (for investment allocation, fund review and fees)
- Review of existing insurances and/or requirements for cover
- Investment Planning – commentary re wealth accumulation planning
- Estate Planning – Commentary re requirements including Wills, Power of Attorney and beneficiary nominations

Package 2: Basic Tax Return and Financial Planning Review / Commentary Report

\$1,850.00 inc GST

Includes preparation of 2 basic tax returns and a review/commentary of 3 of the areas below:*

- Review of existing superannuation policies (for investment allocation, fund review and fees)
- Review of existing insurances and/or requirements for cover
- Investment Planning – commentary re wealth accumulation planning
- Estate Planning – Commentary re requirements including Wills, Power of Attorney and beneficiary nominations

Package 3: Basic Tax Return and Financial Planning Review / Commentary Report

\$2,200.00 inc GST

Includes preparation of 2 basic tax returns and review/commentary of all areas below:*

- Review of existing superannuation policies (for investment allocation, fund review and fees)
- Review of existing insurances and/or requirements for cover
- Investment Planning – commentary re wealth accumulation planning
- Estate Planning – Commentary re requirements including Wills, Power of Attorney and beneficiary nominations

* A basic tax return includes a PAYG Summary, interest income, 1 rental property, 0 – 5 share investments, basic work and investment-related tax deductions.

Requirements prior to commencement of your Financial Health Check

- Tax Return information (as relevant to your circumstances) including:
 - PAYG Summary
 - Summary of Interest Income
 - Summary of rental income and expenses
 - Summary of dividend income
 - Summary of dividend-related deductions
 - Summary of work-related deductions
- Completed Financial Needs Analyser
- Signed Terms of Engagement
- Documentation / Statements for super, insurances and investments
- Existing Wills, Powers of Attorney, beneficiary nominations, etc.

Contact our office today to schedule your financial health check.



chartered accountants and business advisers

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