

Financial health check packages

Holistic advice tailored for you

Our financial health check packages are designed to provide you with valuable, holistic advice tailored to your needs.

	Package 1	Package 2	Package 3
Preparation of two (2) basic tax returns	\$1,500	\$1,850	\$2,200
A basic tax return includes a PAYG summary, interest income, 1 rental property, up to 5 share investments, basic work and investment-related tax deductions	✓	✓	✓
Financial planning* review / commentary of:			
Existing superannuation policies (for investment allocation, fund review and fees)			✓
Existing insurances and/or requirements for cover			✓
Investment planning requirements including wealth accumulation planning	Choose any 2	Choose any 3	✓
Estate planning requirements including Wills, Power of Attorney and beneficiary nominations			✓

Requirements prior to your Financial Health Check

- Tax return information: PAYG summary, details of income and expenses including interest, dividends, rental income and expenditure and work related deductions.
- Documents / statements relating to superannuation, insurances and investments
- Completed Financial Needs Analyser
- Signed terms of engagement
- Existing Wills, Power of Attorney and beneficiary nominations

Contact our team today on 07 3217 2477 to schedule your financial health check



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Business Advisory • Taxation • SMSF Administration • Financial Planning*

L2, 16 McDougall Street
PO Box 1144
Milton Qld 4064

T 07 3217 2477
F 07 3217 2533
apiaryfinancial.com.au

in apiaryfinancial
f apiaryfinancial
✉ info@apiaryfinancial.com.au