

# Our Tax Projection & Planning process:

1. We request details of your expected income, rental losses, capital gains etc, and business profits for the financial year. If you use our cloud based accounting solutions such as Xero or MYOB Live, we will have the business income details already!
2. From this information, we estimate your taxable income and tax payable BEFORE any tax planning strategies.
3. We meet with you to discuss your tax planning and tax minimisation options. Some of these may relate to your business and some may relate to investment and wealth creation.
4. We provide you a report in plain English, that explains the Tax Planning Strategies we recommend and how much tax it will save you.
5. We provide you with an Action Plan, to ensure our recommendations are implemented prior to the 30th June.

**These 5 easy steps could save you thousands of dollars in tax**