

Business Development Menu of Services

We're not just accountants.

We're here to make a real difference to our clients. Delivering a high-quality, efficient compliance service is just part of that. Helping our clients to develop, improve and grow their business is the next natural step. Our Business Development offerings are practical and tangible services that create long term value for clients.

The Client Review Meeting

This is an annual event for a number of our clients. The Client Review is an opportunity for you to set and review your goals and gives you clarity around the actions you need to take to achieve those goals. It also stimulates strategic discussion and identifies burning issues, opportunities and challenges so that you respond effectively. And of course, it's an opportunity for our team to identify greater tax efficiencies and asset protection.

Business Planning

A great business planning process gets to the heart and soul of your business. Upon completion of 'pre-work' we'll have a greater understanding of your vision and core values in order to facilitate a four hour planning session to help you create a clear Business Plan.

The outcome of this service is to identify and prioritise goals both short term and long term, create strategies to achieve your goals, enable you to review actual performance against targets and establish a 90 day action plan to address immediate and critical issues.

Importantly, this process eliminates a factor that is all too common in business - procrastination.

The Organisational Review

Many businesses do not have absolute clarity around their team's defined roles and responsibilities. This often results in owners wearing too many 'hats', meaning they have precious little time to spend in a strategic sense, or on high-level activities that create real value for the business.

An Organisation Review will help you to build a functional organisation chart, visually defining departments, functions, roles and responsibilities. We will help you to structure your business so that it is more sustainable, scalable, and, ultimately, saleable.

Financial Awareness Coaching

We'll help you to understand your business better, enabling you to better manage your cash flow. Good management decisions rely on a sound understanding of the financial implications for your business. This service involves meeting with us every two months to discuss your financial results, culminating in you learning to produce and interpret your own customised financial reports on a monthly basis.

Quarterly Business Coaching

As a business owner you can at times feel alone and unsupported, spending little time working on your business and trapped in the day to day technical aspects. Our quarterly Business Coaching service provides you with increased accountability and support so that you achieve the results you want from your business. The outcomes include increased profitability and cash flow, customised reporting templates to measure actual performance against forecast and access to an expert sounding board to ensure you continue working towards your goals.

Trust Review

The robustness of family trusts is coming under considerable scrutiny as a result of the recent Law Commission review, resulting in a massive wakeup call for Trustees. Our Trust Review Service examines your trust set up, identifies any administration gaps, ensures your Trust is compliant with legislation and that trustees are meeting their obligations.

We've developed a number of resources and templates to help you to understand this complicated topic and to help you develop an effective memorandum of wishes. Most importantly this service provides a framework to ensure your Trust is meeting its objectives.

Life Organiser

The Life Organiser has been designed to provide peace of mind that your affairs are in order and to minimise stress for your loved ones in the event of disability or death. It is a structured central register for you to complete, covering a raft of personal, financial, property, insurance and business details that should be documented and stored securely.

You can simply purchase the Life Organiser and complete it yourself or have a review meeting where we'll manage the process and advise you of any actions we think would benefit you and your estate. Upon completion of your Life Organiser we'll store an electronic copy for you - to be reviewed annually when we meet to discuss your financials.

These are powerful Business Development services that provide immense value and clarity.

Contact us today on 03 214 4166 for your annual Client Review.

Not currently a client? We'd also be happy to discuss your business at a Complimentary Meeting.