

FEE POLICY AND ENGAGEMENT PROCESS

As per the requirements of CPA Australia, we are now required to provide an engagement letter to every client, for each service we provide. An engagement letter sets out the service we will perform and the related cost of the service. As each service is specific to each client we need your work papers to assess our service and related costs based on your circumstances. In addition to this requirement, the ATO are constantly updating legislation so it is important that you review the suggested checklist and provide us with as much information as possible so we can complete our preliminary work and your engagement letter as accurately as possible.

On receipt of your work papers we will send you your engagement letter which you will need to sign and return to us before we can commence work for you. At this stage we will also send you any queries we may have and a direct debit form which you can complete and return with your signed engagement letter via email, fax or mail.

The payment process may vary depending on the type of work but all work will need to be paid either via Direct Debit OR paid in full upfront prior to work commencing.

For example, tax accounts for Companies, Trusts, Partnerships, Sole Traders and Super Funds will have the option to make 4 equal instalments over 6 weeks (fortnightly Direct Debit payments) OR full fee payment upfront (via cheque or bank transfer).

BAS and Bookkeeping work may be paid via 4 quarterly debit payments per annum OR 12 monthly direct debit payments per annum.

We will contact you if your scheduled direct debit payment defaults.

Only if two consecutive payments default will we stop work on your file until the problem can be rectified and completion of your work will not occur until full payment of our fees has been made.

Please do not hesitate to contact us if you should have any questions.