

TERMS OF ENGAGEMENT

For your convenience, here are some general considerations about the way we work:

Help us to help you:

- Please always give us clear instructions.
- When we request information from you please give it to us in writing (Secure Portal or Email) whenever possible.
- Please respond promptly to any important questions that may arise.
- If you ever need anything as a priority please let us know it is urgent.
- Please keep in regular touch and let us know if you have changed address or if you are going away for an extended period.
- Feel free to ask us if you are unsure about anything or do not hear from us when you expect to.
- Please let us know if you think we may have misunderstood you.
- Don't hesitate to ask for a progress report if you are concerned about anything.

Engagement:

- We will require you to sign an **Engagement Letter** which outlines the services we will provide and our hourly rates. Our hourly rates are reviewed yearly and vary in accordance with the skill and experience of staff members and the nature of the assignment. See over for our current hourly rates.
- Fees for services rendered will be based upon time spent to complete the work at an hourly rate plus direct out-of-pocket expenses incurred on your behalf.
- If there is ever any work needed that we feel is outside the terms of the engagement (eg: a need to reconcile supplied information or check its accuracy) we will agree it with you before we start and provide you with an estimate of the additional costs.

Credit Policy:

- Our payment terms are within 7 days from the date of the invoice.
- We reserve the right to charge a service fee/interest on overdue invoices.
- It is our policy to issue invoices for services provided once the assignment is completed however where an assignment is likely to take several months to complete we may invoice each month.
- For some engagements (eg: Company formations), we may require a deposit or payment up front before we will start.



HOURLY RATES

Our hourly rates are reviewed yearly. Our current hourly rates vary from \$150 to \$400 per hour (excluding GST) as follows:

Admin/Reception	\$150 to \$190
Data Entry	\$200 to \$220
Practice Manager	\$260
Accountants	\$280
Senior Accountants	\$320 to \$340
SMSF Accountant	\$340
Taxation Associates	\$340 to \$380
Principal	\$400

ACCEPTANCE

Have you read and understood our Terms of Engagement? YES / NO

Do you accept our Terms of Engagement? YES / NO

We need you to answer 'Yes' to these questions before we can carry out any work on your behalf.

Signed: _____

Name: _____

Dated: / /