

## How to test your Accountant or Financial Planner

You should be able to answer "Yes" to all of these questions:

TBW Standard Service	
	Can your Accountant quote set fees for the year's accounting and tax?
	Can your financial planner provide service on fee for service basis?
	Can your Accountant assist you with your book-keeping requirements?
	Do they provide advice on business structures?
	Do they review your position and provide a year end tax planning meeting?
	Do your Accountants really understand the subtleties of your profession or business? Do they advise other members of your profession or business and can they provide you with testimonials from other very happy clients?
	Do they keep you fully informed?
	Are they proactive with their advice on how your position can be progressively improved? Do they have an in depth understanding of your current financial position and your future objectives?
	Can they provide you with advice on more complex matters such as business valuations and forensic accounting?
	Do they attend professional education programs to keep abreast of all the changes in the Australian Taxation System?
	Do they run regular workshops and seminars on tax planning, business growth and investment planning?
	Do you have a consistent and regular point of contact with the firm?
	Do they have associated qualified Financial Planner and finance broking
	Can they via their associations provide advice on alternative risk management and insurance options?
	Can they via their associations offer sound advice on investment, superannuation and financial planning?
	Are you fully satisfied with their advice and service and are they helping you progressively achieve your goals?

**If your answer to any of the above items was no, then you may not be getting the best available service from your Accountant or Financial Planner. For a no obligation free appraisal contact**

**TBW Accounting & Consulting  
Level 2, 68 Dorcas Street South Melbourne Victoria 3205**

Telephone (613) 9699 8998 Facsimile (613) 9696 3368 Email: [ian@tbwgroup.com.au](mailto:ian@tbwgroup.com.au)