



How our tax planning service works

Step 1

Firstly we request from you details of your expected income and business Profit for the tax year. This includes all:

- Wages/employment income
- Interest, dividends and rental income received
- Business profits / losses; and
- Any capital gains / losses you expect to make.

Based on this information, we estimate your taxable income and your tax payable before any tax planning strategies.

Step 2

Secondly, we discuss all your tax planning options. Some of these may be strategies to do in your business, and some of these may be investment / wealth creation options.

Step 3

Thirdly, we provide you with a report that explains in plain English, the tax planning strategies we recommend and exactly how much tax you will save.

Step 4

And finally, we provide you with an easy-to-follow action plan to ensure that we all can do everything that needs to be actioned before 30 June.

Contact us today to get started!

Don't wait until June, **now** is the time to have a chat to us.

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