GROW YOUR BUSINESS WITH **CLARITY**

TAX ADVISORY
FOR BUSINESS

TRANSACTIONAL
ACCOUNTING
FOR BUSINESS

GRANT
CONSULTING
FOR BUSINESS

WEALTH
FOR FAMILY

GROWTH PROF
ADVISORY

229 Miller Street North Sydney
02 9189 3075

Hours of Operation:

Monday – Friday 9:00 – 17:00

*we also welcome outside business hours by appointment

growthprof.com.au

WHATS INCLUDED IN THIS DOCUMENT

WHY GROWTH PROF

15+ years of tax experience

Tax Practitioners Board registered

Guaranteed fixed price

We simplify the complex

Australian certified accreditations

Guaranteed delivery times

CERTIFIED BY

Membership organisations we represent along with memberships

- Fellow of the Tax Institute
- Registered Tax agent
- Member of CPA Australia
- Tax Institute of Australia
- ASIC registered financial adviser, Limited Authorised Representative 1266708
- Member of Chartered Institute of Management Accountants (UK)
- Bachelor of Science
- Chartered Global Management Accountant (USA)

MEET OUR TEAM

Charitha Wasala
CEO/Founder

Scott Bouquet
Senior Marketing Consultant

Deshani Weerasinghe
Senior Accountant

Mohamed Fawas
Senior Accountant

Mufaris Ahamed
Accountant

Aashik Farook
Accountant

Nishadi Kaushalya
Accountant

Shakkurthi Kumaravel
Intermediate Accountant

MEET OUR TEAM

Lareefa Munowfar
Intermediate Accountant

Kumudumali Weerasinghe
Intermediate Accountant

Sadeepa Balasooriya
Intermediate Accountant

Navena Sivalingam
Team Lead - Legal Projects

Udaya Shanthy
Legal Project Associate

Nirosha Kasthuriarachchi
Administrative Executive

Shanika Dilrukshi
Executive - People & Culture

CEO FOUNDER

Charitha Wasala

Founder - Growth Prof
Founder - Growth Prop
Founder - Growth Guardian

Chartered Tax Adviser(CTA) , CPA, ACMA, CGMA, BSc, ASIC registered financial adviser, Limited Authorised Representative 1266708 of Merit Wealth Pty Ltd, Australian Financial Services Licence 409361

Key Skills Highlights

1. Hands on experience with and high-net wealth individual groups portfolio.
2. Exposure to large & complex private business groups .
3. Demonstrated analytical skills to evaluate client's businesses and provide value added services such as minimising tax liabilities, identifying trends and working capital management improvements, etc.
4. Present professionally and possess excellent interpersonal and communication skills.

Key Projects

1. Financial standard acquisition of Momentum Media - Due diligence.
2. Uncle Tetsu Global - Restructure to optimize group tax position; Setting up tax consolidated group.
3. Prime APT Group: Restructure - Tax consolidated Group.
4. Bright capital group - Early stage investor offset advice to bring capital partners.
5. Private client group - Stratum unit CGT structuring.

OUR SERVICES

At Growth Prof Accountants offer a broad range of accounting and taxation services, including:

- Super
- Estate Planning
- Financial Planning
- Xero Accounting
- Bookkeeping
- Tax Planning
- Property Loans
- Asset Protection
- Coaching session
- Virtual CFO

OUR SERVICES

Life Insurance

General Insurance

Car Finance

Wills

Conveyancing

Salary Packaging

Property Investment

Retirement Planning

Strategic Planning

Business Valuation

Investment review

Self Managed Super Funds

Share/Funds Investement

Cashflow & Budgeting

OUR PROPOSAL AND PACKAGE

Growth Prof offer a range of services that extend beyond the preparation of annual financial statements and income tax returns.

We have come up with the below packages that you may be interested in.

Package 01

Compliance Only

- Annual financial statements
- Tax planning review (in April/May)
- Lodgement of BAS
- Tax Return Preparation & Lodgment
- Unlimited email and phone support (brief phone calls only)

ASIC lodgments will be invoiced seperately

Bonus includes

- Annual Business and personal needs review
- Loan comparison review
- Regular e-mail newsletter

From	From
$250+ GST	$3,000+ GST
Per Month	Per Yearly

COMPLIANCE ONLY PACKAGE

Ask about our Advice Plus or our Virtual CFO services!

COMPLIANCE BASICS

Compliance Basics is our entry level service and suits small businesses who want us to complete just their annual Tax Returns and Financial Statements – if you do not need our assistance to grow your business and you wish to complete your own Business Activity Statements (BAS), FBT Returns and PAYG Reconciliations, then this package is for you!

Our Compliance Basics Fixed Price services attracts a minimum price of $2000 plus GST per annum. We request that you pay 50% of the fixed amount up front and 50% upon completion of our services.

YOUR PACKAGE INCLUDES

- All annual taxation requirements completed by an agreed date within an agreed budget. We will complete your annualfinancial statements, income tax returns, and tax administration (tax assess-ments and reminders)
- Annual tax planning review in April / May
- Annual business and personal needs review
- Loan comparison review
- Regular email updates with advice to keep you informed of relevant tax and business issues.

IMPORTANT

Our fixed price is conditional upon you providing us with a properly reconciled and balanced Xero, MYOB or QuickBooks file at the end of each financial year, within a specified time frame.

Compliance Basics is a "lite" service, because our opportunity to view your company information is only once a year.

However, you may choose to approach us for proactive advice at any time. We can provide you with an up-front fixed price quote for any of our services at any time!

Timely preparation of annual financial statements and tax returns.

Enhanced tax planning

Business and personal needs review.

Loan comparison review.

OUR PROPOSAL AND PACKAGE

Package 02

Advice Plus

Compliance Only Package +

- Preparation & Lodgment of BAS
- Online view of cash position
- Quarterly review of your data entry
- Maintain Fixed Assets Register and Calculate Depreciation

ASIC lodgments will be invoiced seperately

Bonus includes

- Annual Business and Personal Needs Review
- Loan Comparison Review
- Regular e-mail newsletter

From $350 + GST Per Month

From $3,600 + GST Per Yearly

- Tax Planning billed seperately

ADVICE PLUS PACKAGE

ADVICE PLUS

Advice Plus is our fixed price packaged accounting and taxation service offered and uses the Xero Online Accounting System. It suits small to medium sized business owners who are looking for proactive advice to grow and manage their business.

Our Advice Plus service starts from as little as $3,500 plus GST per month. Once set up, the monthly fee removes the need for a large end of year accounting bill – useful for managing cashflow.

WHAT IS XERO

Xero is an online accounting system designed for small to medium businesses and their advisors.

- Incredibly easy to use
- 24/7 access from anywhere using the internet
- Automatic importing of bank statements
- Free automatic updates, automatic data backup
- Unlimited users

YOUR PACKAGE INCLUDES

- Proactive business advice every 3 months.
- We'll complete your annual financial statements, income tax returns, business activity statements and tax administration (tax assessments and reminders).
- Annual tax planning review, business and personal needs analysis.
- Regular email updates with advice to keep you informed of relevant tax and business issues.
- Xero online accounting software – we provide you with full
- training, you input the basic data, we check it.

CERTIFIED BY

PRACTICE Ignition

The Tax Institute

CHARTERED ACCOUNTANTS AUSTRALIA + NEW ZEALAND

CPA AUSTRALIA

xero SILVER PARTNER

OUR PROPOSAL AND PACKAGE

Package 03

Virtual CFO

Advice Plus Package +

- Coding and reconcilliation of bank accounts
- Budgets prepared and review quaterly
- Quarterly management reports
- Business performanc health check
- Quarterly business strategy meeting (Phone or Skype)
- Annual strategic planning meeting
- Annual 12 month cash flow forecast & profit plan
- Monthly profit & cash flow actual - V- budget report

ASIC lodgments will be invoiced seperately

Bonus includes

- Annual business and personal needs review
- Loan comparison review
- Regular e-mail newsletter

From	From
$2,000+ GST	$24,000+ GST
Per Month	Per Yearly

if you need a custom plan, please discuss with us

VIRTUAL CFO PACKAGE

Business Performance Portal

This package includes a Business Performance Portal where all your business documents, policies, procedures and financial data are stored. Fully cloud based and secure, we store all your Monthly or Quarterly Key Performance Indicator reports and commentary or any other documents. Please request a demonstration from your client manager.

VIRTUAL CFO PACKAGE

CFO package

This package involves conducting professional, minuted board meetings with yourself and business partners either monthly or quarterly. It is ideal for those clients who want to be held accountable to not only financial results and associated targets, but also to the implementation of business improvement tasks that allow the business owner or entrepreneur to grow the business

To achieve this we educate and conduct three core functions within each board meeting. These include:

- **Rolling Activities:** a list of business improvement ideas added and removed as implemented by your team or yourself. Tasks roll forward on the agenda until completed.

- **Quad Activities:** we mentor the business owner or entrepreneur to move from Quad A (reactive activities) also known as Urgent and Important activities to Quad B (proactive activities) also known as Important but not urgent activities. Highly effective business owners and entrepreneurs work in Quad B (proactive activities) to achieve success and business growth.

VIRTUAL CFO PACKAGE

CFO package

- **Business Performance Portal (BPP):** As part of the CFO and CFO plus packages your business receives a fully cloud based BPD. Your BPP is your central gateway to all Board Meeting Minutes and Financial Reports, can be accessed anywhere, anytime.

OUR PROPOSAL AND PACKAGE

Other additional services we provide include

Business Enhancement Services

- Strategic Planning Session
- Customer Advisory Board
- Business Performance Review
- Business Succession Plan
- Business Valuation Report
- Wealth "LifePlan"

All services above can be "mixed and matched". Please contact us for a discussion about your circumstances!

If you are interested in any of these packages, please let us know and we will contact you to fine tune your requirements and make arrangements to schedule your work.

VALUE ADD: WHAT'S INCLUDED IN ALL PACKAGES

Area to Check:
Business & Life Risk Level Assessment:
A "Life Scorecard" Goals Review
Review Financial Statements & tax Returns
Total Assets
Total Liabilities
Net Equity
Loan to Value Ratio- Property
Loan to Value Ratio - Overall
Property Acquisition
A Retirement Calculator
Ideal Income Calculations
Refinance
Disposal Income Per Year
Strcture
Ownership

All of the above packages include:

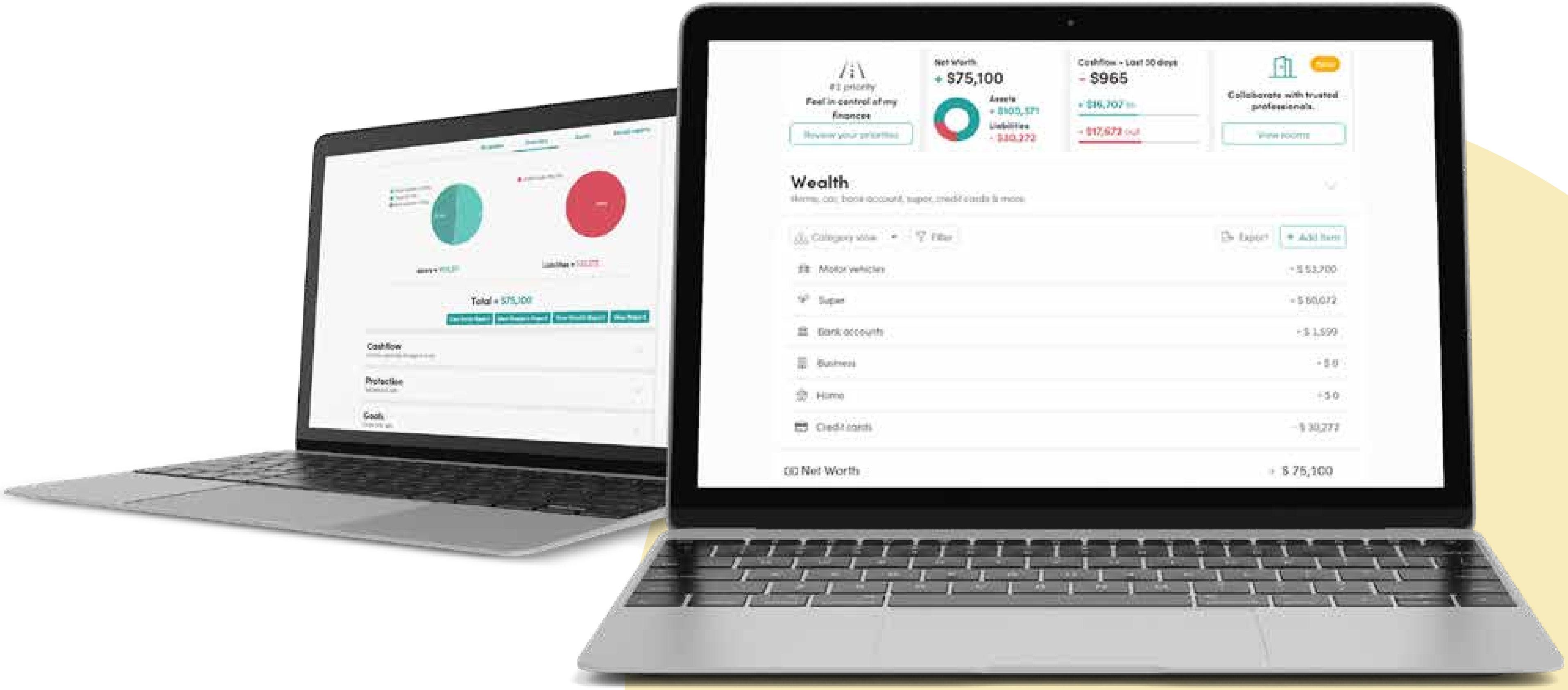
- Unlimited telephone calls and emails within our email and telephone policy.
- Access to Growth Prof Personal Wealth Portal.
- An Annual General Meeting (AGM), that includes all of the Area's stated in the table to the left.

VALUE ADD: WHAT'S INCLUDED IN ALL PACKAGES

23 Step Sales	Area to Check:
A.G.M	*Business & Life Risk Level Assessment.*
15	Income Protection
16	Life Insurance
17	Wills
18	Insurances
19	Succession
20	Family Budget
21	Business Valuation
22	Business Mentoring
23	Self-Managed Superannuation Fund

VALUE ADD: WHAT'S INCLUDED IN ALL PACKAGES

PERSONAL WEALTH PORTAL



OPTIONAL EXTRA'S

Please note the following in relation to our package offerings:

- ASIC compliance exclude payment of your annual ASIC fee on your behalf.
- Our fees are exclusive of your Xero and Receipt Bank subscriptions on all packages.
    - Payroll processing for $50 + GST per payslip
    - Annual tax planning for $2,500+ GST per year.
    - Pro version of Growth Prof Personal Wealth Portal for $50+GST per month.
- Fees are payable monthly by direct debit or upfront
- Packages are reviewed and renewed annually in June / July each year
- Packages can be upgraded or downgraded at any time with 30 days notice

BENEFITS AS COMPARED TO OUR COMPETITORS

We are confident in offering you expert services in line with your expectations and above those offered by our rivals. With that in mind, we do the following things differently to our competitors for your benefit:

- **Schedule Work**

  We schedule your work for a time that works for you. This allows us to ensure that we have available resources when required to be able to complete your work fast and to a high standard.

  This allows us to meet our KPI of completing annual financial statements and tax returns within 4 weeks.

- **Collect Information Up-front**

  Prior to starting any job, we provide you a specific checklist of the information that is required. This means that when we start work we have everything that we need to do the job quickly, efficiently and without distracting you. Provided we have all information jobs are processed within 4 weeks

- **Fixed Fees**

  99% of accountants make more money by being inefficient and spending more time doing your work. This is crazy and we don't want to be a part of it.

  That is why we provide a fixed fee proposal before starting every job. You will know what your work will cost upfront and you will never receive a surprise invoice.

BENEFITS AS COMPARED TO OUR COMPETITORS

- ## Technology

  We use the latest technology to drive efficiency in our business. This means that you get top quality service at competitive prices.

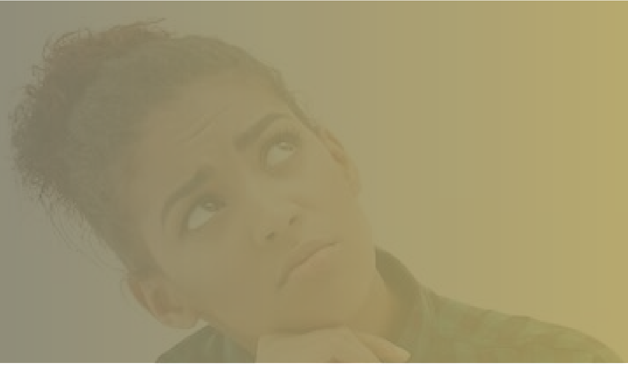
- ## Relationships

  We understand the importance of a strong working relationship. Clients get the greatest value from our services when there is a strong working relationship and when we are clear on your goals, challenges and opportunities.

  For this reason, we encourage clients to stay in touch and do not charge them for telephone calls and emails.

  We also like to schedule at least one meeting every year (an AGM) with clients with their Client Manager at no extra cost.

  Lastly, we understand the importance of your "accounting team" working together cohesively. In this respect, we make it our business to build a strong working relationship with our client's in-house accountants, bookkeepers & outsourced payroll providers.



WHAT TO DO NOW

If you require any further information or clarification on our services or on how we do business, please tdo not hesitate to ask.

If you feel that Growth Prof are a good fit for your business and wish to engage our services, then simply let us know. We will then be in contact to make the necessary arrangements to take-over as your accountants.

Be organised . Do your homework to organise documents Be responsive - please work with us promptly and set aside time to do the project Be flexible - we might recommend software that improves productivity so you save time and we can deliver the work as agreed.

LEARN MORE