Nexia Australia

Tax Alliance

Where Tax Matters

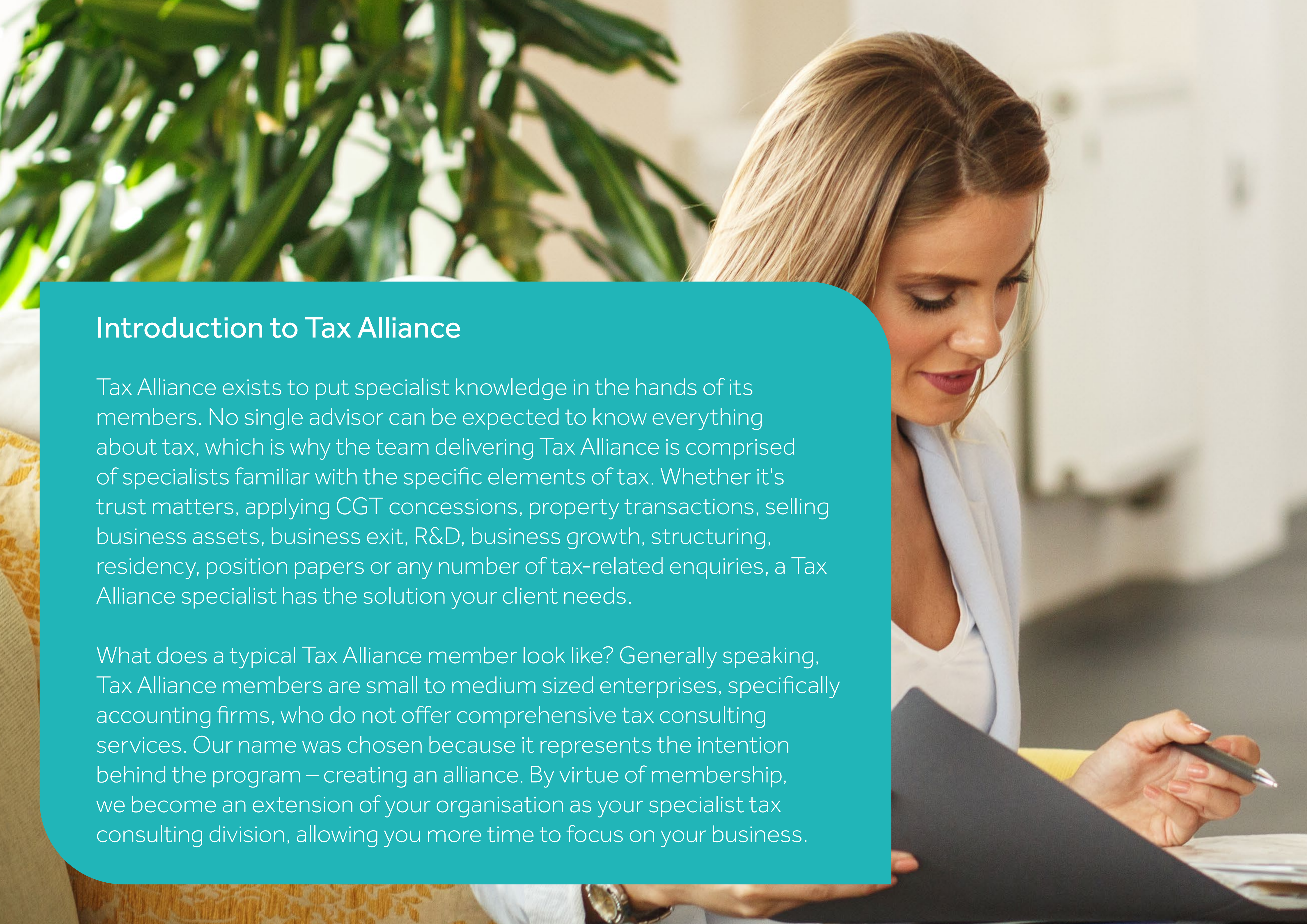

Ms
Current Name
Street Name. 1
70000 City Name
Invoice
Total
VAT 15%
Total Amount Payable

Contents

Welcome to Tax Alliance

Comprehensive in nature and complex in action, tax is anything but dull. Australia's tax code is a dynamic and evolving force characterised by legislative amendments, regulator guidance and specialist interpretation. Given the complexity of the landscape, how is one person meant to stay up to date with all relevant developments?

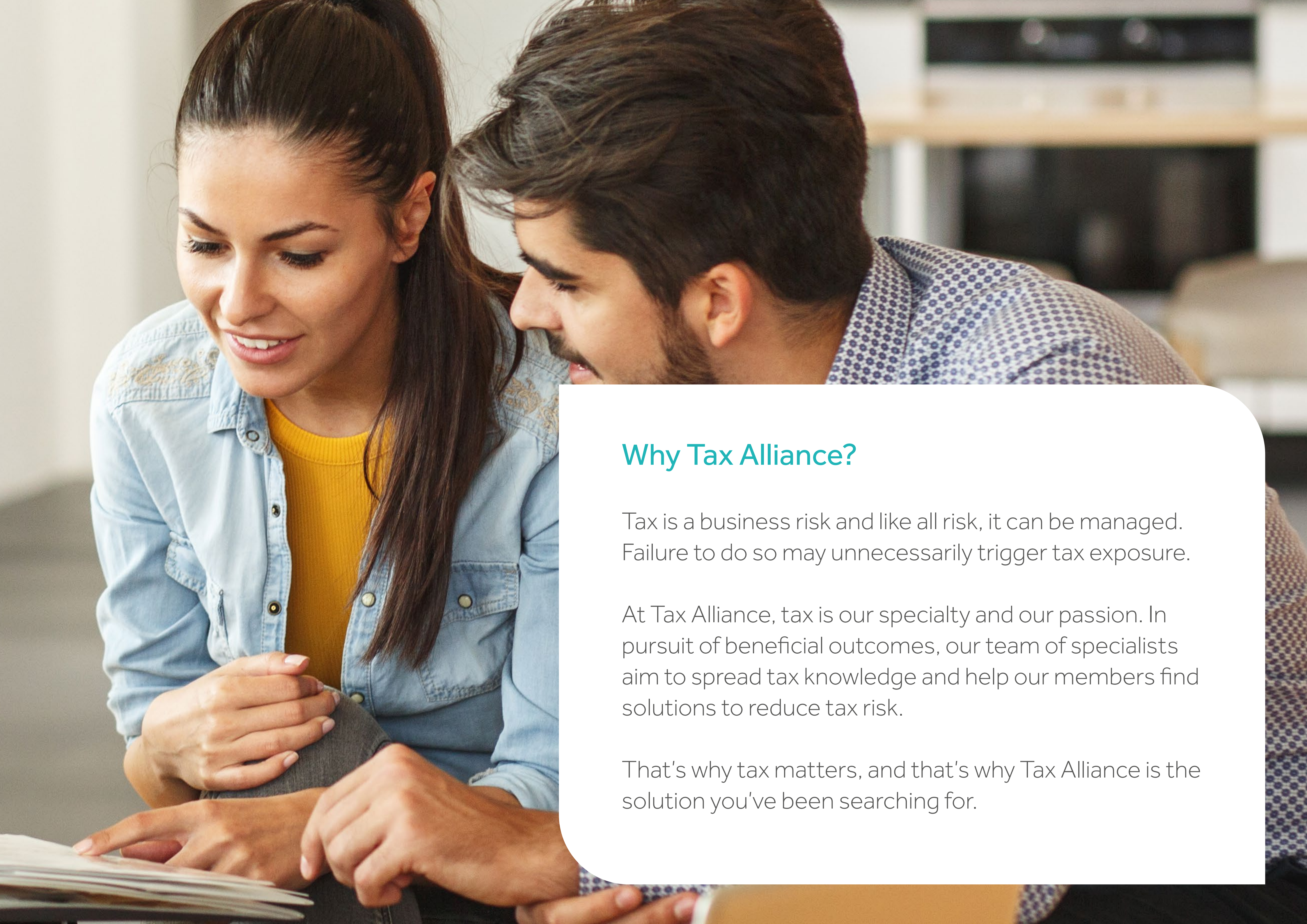
Enter your Nexia Tax Alliance specialist.



Introduction to Tax Alliance

Tax Alliance exists to put specialist knowledge in the hands of its members. No single advisor can be expected to know everything about tax, which is why the team delivering Tax Alliance is comprised of specialists familiar with the specific elements of tax. Whether it's trust matters, applying CGT concessions, property transactions, selling business assets, business exit, R&D, business growth, structuring, residency, position papers or any number of tax-related enquiries, a Tax Alliance specialist has the solution your client needs.

What does a typical Tax Alliance member look like? Generally speaking, Tax Alliance members are small to medium sized enterprises, specifically accounting firms, who do not offer comprehensive tax consulting services. Our name was chosen because it represents the intention behind the program – creating an alliance. By virtue of membership, we become an extension of your organisation as your specialist tax consulting division, allowing you more time to focus on your business.



Why Tax Alliance?

Tax is a business risk and like all risk, it can be managed. Failure to do so may unnecessarily trigger tax exposure.

At Tax Alliance, tax is our specialty and our passion. In pursuit of beneficial outcomes, our team of specialists aim to spread tax knowledge and help our members find solutions to reduce tax risk.

That's why tax matters, and that's why Tax Alliance is the solution you've been searching for.

Membership Benefits

Our Tax Alliance membership is a premium service led by some of Australia's sharpest tax minds. Membership includes the following:

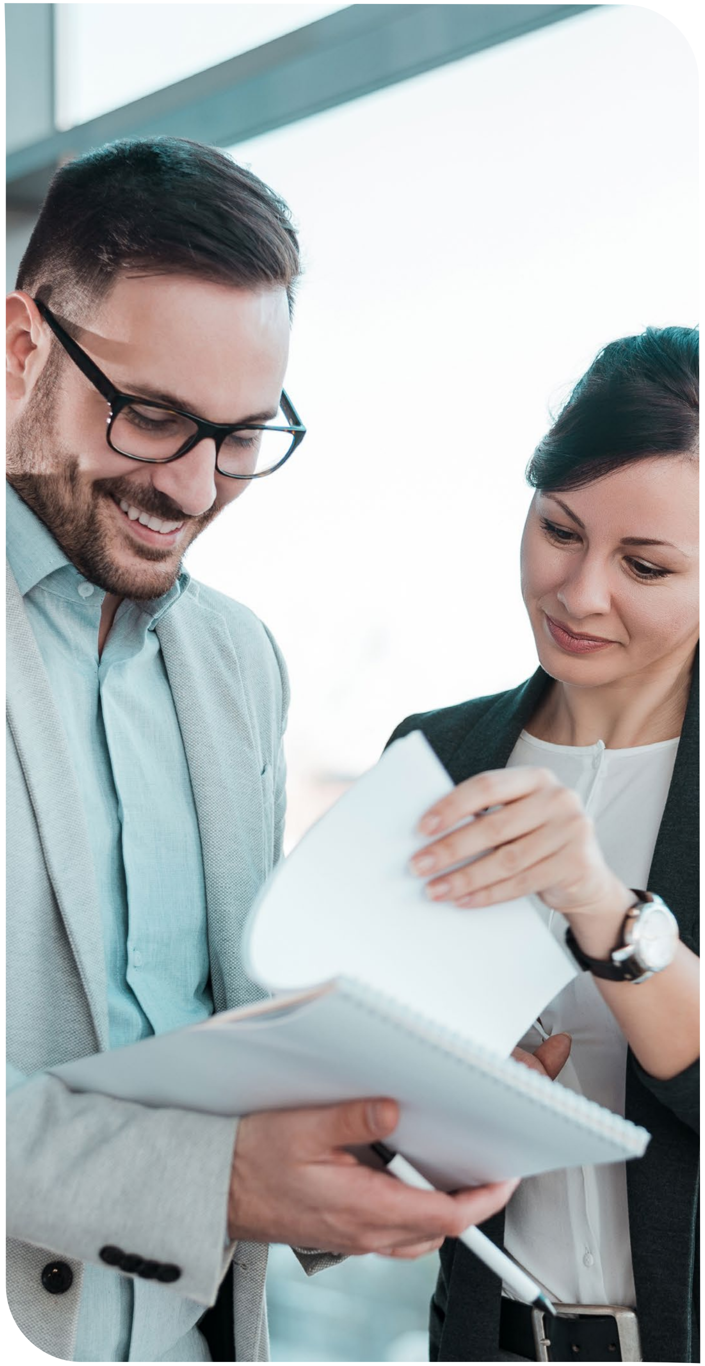
- Complimentary seminars per membership period
- Access to our monthly newsletter with in depth topical taxation updates
- Complimentary phone calls via our unlimited Tax Alliance advice hotline
- Access to fee-for-service written specialist advice
- Rigorously researched and tested tax specialist opinions granting peace of mind
- Fee-for-service transaction transparency
- Member client non-solicitation policy
- Strengthened understanding of tax and related topics
- Referral and networking opportunities
- Brand cooperation and association with a leading global mid-tier accounting network

How Tax Alliance Works

As a Tax Alliance member you not only gain access to specialist advice, you also are included in the Tax Alliance community where you have access to newsletters and tax training seminars that dissect relevant tax and business matters. Tax Alliance members are entitled to have unlimited employees (from their firm) attend these training sessions to get the most out of their membership investment.

Given the complexity and depth of information shared during training sessions, we understand that Tax Alliance members will have questions. We therefore support our membership with a free and unlimited tax-based enquiry phone call service. Better still, membership automatically triggers access to this service. Meaning, should you come across a complicated tax matter and wish to seek a non-binding verbal guidance or direction, our support team is ready to take your call.

In the instance where a Tax Alliance member wishes to receive written advice, a fee-for-service offer is also available. Typically, a fee-for-service arrangement is where a Tax Alliance member acts on behalf of their client in respect of a complex tax matter, and requires a written opinion authored by a specialist tax practitioner. Opinions are drawn from specialists in Nexia Sydney's Tax Consulting service line who conduct rigorous research and perform the necessary tests to deliver you with clear and sound advice.



We respect the sensitive nature of referral business. Therefore, Tax Alliance members are free to choose the manner in which the fee-for-service arrangement is executed. For example, a Tax Alliance member may choose an arrangement similar to an outsourcing program, where the Tax Alliance member acts as an intermediary between their client and our specialist Sydney Tax Advisor. Alternatively, a Tax Alliance member may prefer that their client liaises directly with our specialist Sydney Tax Advisor. Ultimately, the choice is yours.

Trust underpins everything Tax Alliance stands for, which is why reinforcing the following message is vital: Tax Alliance has a zero-tolerance approach to client solicitation. When a fee-for-service arrangement is formalised, experts in Nexia Sydney's Tax Consulting service line represent the Tax Alliance member and perform work on their behalf for submission to their client. We operate in good faith and emphasise that the Tax Alliance member is not only our client but our partner - we are the specialist tax consulting arm of your business!

Our Fee-For-Service Process

We understand the unique nature of individual circumstance and do not apply a one-size-fits-all approach. Therefore, we provide a bespoke service tailored to meet the specific needs of our Tax Alliance member's client.

Before a fee-for-service engagement commences, we conduct a no-obligation meeting with the Tax Alliance member and their client to discuss their client's unique situation. During this session, the member's client explains their situation and desired outcomes, followed by our specialist Sydney Tax Advisor raising relevant tax issues and considerations. Should the member's client elect to end proceedings, the engagement is concluded. However, should written advice be requested, we provide a clear fee proposal and scope of services for approval before commencement.

Step 1

Initial Enquiry

Tax Alliance member is approached by their client regarding a complex tax matter. The member then contacts Tax Alliance to schedule a meeting.

Step 2

Complimentary Meeting

Parties attend the complimentary meeting where the member's client can explain their situation, and relevant tax issues are discussed.

Step 3

Engagement Decision

Post complimentary meeting, the member's client may elect to end proceedings (at no cost) or advance the engagement to procure written advice.

Step 4

Fee Proposal & Scope

Before commencing, the fee proposal and scope is forwarded for approval. Once agreed, our services commence.

Step 5

Commencement

Our Nexia Sydney tax specialist begins research, conducts extensive testing and formulates advice.

Step 6

Completion

Written advice is delivered to the Tax Alliance member and client, thus ending the engagement.

Tax Alliance Subscription

A one-year subscription (July 1 – June 30) for Tax Alliance is competitively priced at $299. Your membership fee will be pro-rated based on your registration date.

Under one membership, an unlimited number of professionals from the same organisation are permitted to attend each tax training seminar and enjoy access to our complimentary Tax Alliance advice hotline.

Subscription

$299 incl. GST July 1-June 30

Further Information

To become a Tax Alliance member, or to learn more, please contact a member of the team directly at **taxalliance@nexiasydney.com.au**.

Contact Information

Nexia Sydney
Level 22, 2 Market Street
Sydney NSW 2000

t: +61 (02) 9251 4600
f: +61 (02) 9251 7138
e: taxalliance@nexiasydney.com.au

All information provided by accessing the Tax Alliance hotline is provided to aid members with their own research on Australian tax and regulatory matters. This service is not to be relied upon as legal, accounting, or tax advice. Should you require taxation advice, we can provide written tax advice under a separate engagement.