



YOUR ONE STOP FINANCIAL SHOP
1800 GO 2020

Customer Service Charter



ellis business

accountants pty ltd

Our Promise To You

Thank you for trusting your financial needs to our firm 2020 Financial Solutions. As our name suggests we excel in finding solutions for our clients in all facets of financial management.

We are a firm that approaches advice differently to most. We promise that we will save you tax and create wealth for your family through our strategies, effort and expertise. We will spend the time and our considerable resources making sure we match your financial needs with our creative efforts to provide you with bottom line results. You can hold us to this promise and each review period we expect to be examined on the strategies and efforts we have implemented.

We view our relationship with you as a very special one. We aim to help you take a 'journey' through life and be able to mix core rational sound financial decisions with your own varying personal preferences. We hope our relationship with you will be dynamic and sustainable.

There has never been a climate in Australia such as this – ripe with opportunities for correct business tax planning and superannuation options.

We regularly present free education seminars on significant topics of interest and would be pleased for you to contact us to find out details of upcoming dates for you and your family to attend.

We have clients broadly spread across Australia and we welcome the challenge to tailor strategic advice for you!!



Nic Ellis & the 2020 Team.



Introduction

2020 Financial Solutions is a one stop financial shop – we aim to provide a comprehensive range of financial services to individuals and small business clients throughout Australia.

The team is made up of accountants, solicitors, business planners, tax strategists, mortgage brokers, retirement planners and risk insurance brokers.

Our offices are located overlooking the Pacific Ocean in Merimbula on the far South Coast of NSW, in Jindabyne at the foot of the NSW Snow Fields and in Newcastle in the vibrant cosmopolitan Beaumont Street area of Hamilton.

Our client base is broadly spread across Australia and ranges from Medical professionals to heavy industry, trades, retirees, retail stores and restaurants.

As a core aim we endeavour to create wealth for our clients through strategic financial advice, asset protection and tax minimisation.

2020 Financial Solutions is licensed to deal in and advise on a full range of financial products and investments. Our statements of advice integrate quality investment advice with sound business planning, tax planning and superannuation planning strategies.

This means that our clients pay the least amount of tax possible while maximising investment and business returns.

Our Core Services Include

- SMSF Setup and Ongoing Administration
- Setup of Account Based and Transition to Retirement Pensions
- Preparation of Financial Reports
- Business Advisory Services - Strategic tax planning, business and entity setup
- Taxation Consulting and Returns - Income Tax, GST and International tax issues
- Business Management & Consulting - Cashflows and Valuations
- Estate Planning and Probate work
- Company setups and full corporate Secretarial Services
- Succession planning, Key person and buy and sell agreements
- Financial Planning - Investment and Placement of Funds through PIS
- Remuneration Services - Salary Packaging & Effective Salary Sacrifice
- Maximising Centrelink Benefits & retirement planning
- Risk Insurance through PIS & General Insurance Reviews and Recommendations
- Small Business Bookkeeping and Software Solutions
- Debt Consolidation / Refinancing Loans
- All new business and home loan requirements through full mortgage broking services.
- Full Legal Services including Business Law, Conveyancing and Family Law.

Service and Standards

Services

As your Tax agent, Accountant & Advisor I will:

- Prepare & Lodge your personal/business/ and or related entity Income Tax Returns.
- Prepare & Lodge your personal/business/ and or related entity activity statements (if needed)
- Provide general income taxation advice, including business tax, FBT, CGT and other specific advice on request.
- Act as your contact with Australian Tax Office for matters relating to your taxation affairs
- Provide all other necessary client services including company secretarial and business valuations upon request.
- Prepare financial statements for your entities where required.
- Comment and provide to you wealth creating opportunities, based on the best-fit tax planning and asset protection for your circumstances.

Standards

We aim to provide the highest standard of professional service and are focused on the concerns of our clients.

If for any reason you feel you have not received the service level expected or have an issue to raise, please, at first instance, contact us to discuss how the problem may be resolved.

Professional Fees and Payments

All professional fees for the services provided to you will be based on the time and degree of skill and acumen required in completing the tasks.

Terms of Payment

Unless other terms have been agreed to, our terms of payment are strictly payment on receipt of each invoice. We will provide you with an itemised account of all fees, costs and disbursements upon request.

Disclosure of other fees and commissions

We disclose to our clients any commissions or other fees received as a result of work done for that client and will fully comply with any statutory requirements in relation to the disclosure of such information.

Documents

We shall endeavour to ensure that documentation is lodged with the relevant departments by the due dates, provided all information and documentation is received by us from you in a timely manner to allow us adequate time for preparation and lodgement of the documentation.

Ownership of Documents

The final financial statements, tax return and any other documents which we are specifically engaged to prepare, together with any other original documents given to us, shall remain your property. Any other documents brought into existence by us including general journals, working papers, the general ledger, draft financial statements and/or tax returns, will remain our property at all times.

Ownership of Documents (cont.)

However, we will always provide you with copies of any documents that you may require from time to time.

Quality Review

As a Member of the National Institute of Accountants (NIA) I am subject to periodic quality assurance reviews. Unless otherwise advised by yourself; by engaging our firm, you are consenting to your files being part of such a quality review.

Previous Accountant

If we are taking on the brief as your accounting firm, we will need to inform your previous accountant that we have been engaged by you as your new accountant and to receive from them any outstanding matters and files. You may refuse to provide this information but in doing so it may cause problems in the efficient transfer of your files.

Previous Returns

Please note that we are not engaged to review the accuracy of any returns lodged by your previous accountant.

Privacy and Confidentiality

We will respect the confidentiality of personal information you provide us, or may become privy to, and use it only in accordance with the law.

Our Mission

Our mission statement is based on the desire to forge long term relationships with our clients through providing a combination of the best service and the right strategic advice.

Customer Service

Support Staff – The Team.

2020 Financial Solutions has a large and friendly support team that works in conjunction with the 'specialists' to provide you with more personalised service. This support team is highly trained in dealing with ASIC, the ATO, State Revenue Office and a range of regulatory organisations on your behalf. They pride themselves on their quick response time and productive client interaction and communication skills.

Because we know how important it is that you receive outstanding service from us, we expect all our staff to:

- Be polite and helpful
- Extend friendly welcome to all clients
- Communicate clearly at all times

Customer Complaints

2020 Financial Solutions will do it's utmost to ensure an expedient resolution to any client complaint.

To help streamline the handling of any complaints should they arise, 2020 Financial Solutions has established a Quality Assurance complaints handling process. All that is required is for the customer to place the details in an email and send to newcastle@go2020.com.au for action.

Information obtained through this channel will be used for the purposes of continuous improvement across the firm.

Personal Details

How often you would like a Review of your Structures/Strategies and or Investments?

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Your Relationship Manager's Details:

Name:

Email:

Phone:

Your Advisor's Details:

Name:

Email:

Phone:

Your Business Service Manager's Details:

Name:

Email:

Phone:

Other Contacts:

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Where you can find us:

Toll Free all offices:
1800 46 2020

Email: info@go2020.com.au

Newcastle:

103 Beaumont Street
PO Box 1025
Hamilton NSW 2303
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Sapphire Coast:

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