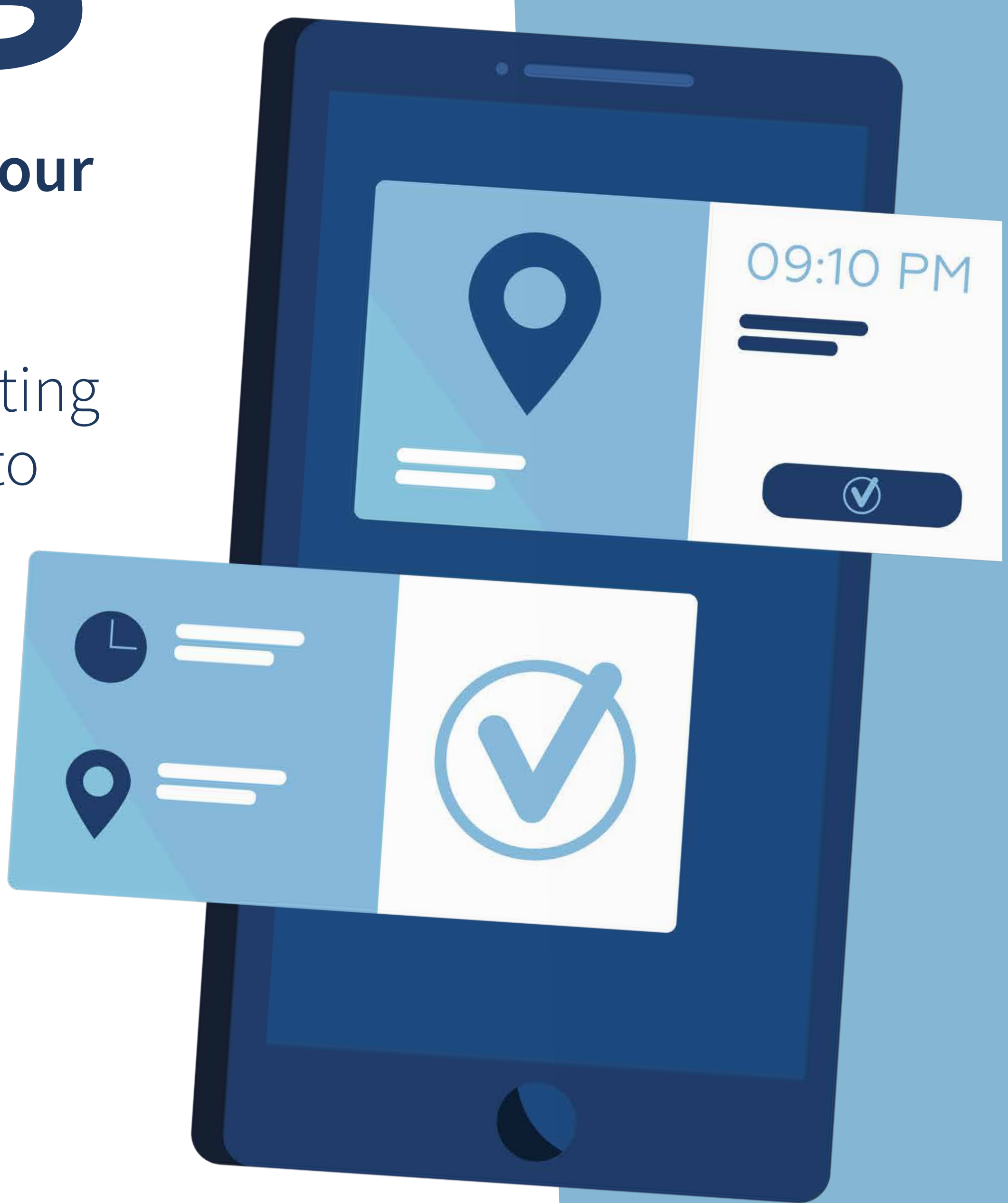
Lesser & Co.
CHARTERED ACCOUNTANTS
AND BUSINESS ADVISORS

Your Complimentary Client Review Meeting

We're here to make a real difference to our clients…

Delivering a high-quality, efficient accounting service is just a part of that. Helping you to develop, improve and grow your business is the next step.

As a valued Ltd company client, you can have a Complimentary Client Review (CCR) annually usually once your yearend accounts are complete but can be anytime.



A CCR stimulates strategic discussion and identifies burning issues, opportunities and challenges so that you can respond effectively.

It's also an opportunity for our team to identify greater tax efficiencies. A CCR meeting is an ideal opportunity for you to meet with us to discuss any of the following:

1. Your goals for your business and how you plan to achieve them.
2. How your business goals tie in with your personal and lifestyle goals.
3. Issues and challenges you are facing in your business e.g. growth, profitability, cashflow, a planned exit from or sale of your business.
4. How you can work with us to address these issues and plans.

Keen to improve your business performance, financial results and tax efficiency?

Book a CCR now.

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Complimentary Client Review

Outline & Benefits

Why we developed this service.

It's extremely important to work **on** your business, not just **in** it. Taking time out to discuss what's happening in your business is essential to give you clarity about your future and vision to enable us to support you in the most appropriate ways.

A Complimentary Client Review is an ideal opportunity to meet us on a complimentary, obligation free basis to discuss any of the following:

- Your goals for your business and how you plan to achieve them
- How your business goals tie in with your personal and lifestyle goals
- Issues and challenges you're facing in your business, e.g. growth, profitability, cashflow, succession, etc.
- How you can work with us to address these

What is involved?

You'll meet with a senior team member for a **60 minute session**, reviewing your current situation and discussing how we can support you to resolve your burning issues. We will send you a copy of the Meeting Minutes documenting your business and lifestyle goals and all agreed action. If required, we will also **prepare a proposal** for you including upfront prices of our services for any additional support work that we identify during the meeting.

When should I get a review?

We want to stay in touch regularly to ensure your business and personal goals are being met.
We have set aside time for this meeting to happen after your financial statements have been completed.
Of course, you don't have to wait until then; you can contact us any time to arrange a catch up.

Who should have a review?

If you want to improve your business performance and financial results, and minimise any risk in your investments, schedule a Complimentary Client Review. We're not just advisors on your rear-facing tax matters - **we want to help you achieve your future business goals.**

We'll review and discuss your current situation at no cost. It's an opportunity for us to check in with you to ensure that we are giving you all the assistance that you need. For example, we might be able to help you with some strategies to help you grow and protect your assets or improve your efficiency and effectiveness.

Benefits of a Complimentary Client Review

- Clearly discuss and document your business and lifestyle goals
- Gain clarity of the actions you need to take to achieve your goals
- Stimulate strategic discussion around the current and future direction of your business
- Identify your burning issues, opportunities and challenges so you can respond effectively
- Gain a better understanding of your business
- Access the collective wisdom of our firm
- Assess the current structure of your business
- Potentially identify greater tax efficiencies
- Gain a better understanding of the ways we can support you