

FREQUENTLY ASKED QUESTIONS

Why am I signing an agreement?

It is a requirement of our professional association CA ANZ that all work undertaken is covered by an up-to-date and relevant engagement letter. This letter ensures we both have a common understanding of what is required to be delivered and for what charge and also lists our general terms of doing business and also anything specific to the services you have requested.

Why do you want a Digital signature?

Electronic signatures are a far more efficient way of collecting your agreement and allow you to sign anywhere without the use of a printer, paper, scanner - this saves you and us time, not to mention the environmental benefits of going paperless!

Can I print and sign this proposal manually?

While we'd prefer that you sign the proposal with the digital signature tool, you can print a copy of this proposal by clicking on the "view PDF" link in the bottom right of the "terms" section of your online agreement. We would of course encourage you to sign electronically to save time and the environment.

Do I get a copy of the agreement for my own records?

Yes, as soon as you sign and accept your agreement, you'll be emailed a copy of the proposal as a downloadable PDF for you to store wherever you like.

What if I need you to change the proposal before I accept it?

No problem. Just let me know in the conversation tab at the bottom of your online proposal, and I'll be able to make any changes to your proposal before you accept.

What if I need more/different services?

- 1. If you need to add more/different services before you accept the proposal:** Just let me know in the conversation tab at the bottom of your online proposal, and I'll be able to make any changes to your proposal before you accept
- 2. If you need to add more/different services after you accept the proposal:** Please contact me to let me know what you need and we will happily issue a "change of service request" for your review and acceptance. We will not commence work, or collect payment for, additional services until we've received acceptance for your change of service proposal. Please note you **will not** have to re-enter your payment information (unless you'd like to change the payment method).

Why does the email look different to the ones I normally receive from you?

The email containing a link to your electronic proposal is sent directly from our proposal and billing system - Practice Ignition - and not through our email client {Outlook}. The email will have our branding, but the

email address may have a no-reply@practiceignition.com address. If you wish to reply back to us on the proposal, please click on the link and leave a comment on the proposal - we will then comment back and you will receive our reply by email and this will also be added to the bottom of the proposal.

Why are you asking for payment details? How are my payment details stored?

As part of our new proposal system for ongoing service clients, this will automate our invoicing, collections and reconciliations process. The good news for you is that you will not have to worry about remembering to pay invoices and will only have to re-enter details if you wish to change your information. This will also allow us to spend less time administering and more time working with you! When you enter your payment information it is stored securely and safely in compliance with PCI DSS standards and we don't manually store or have access to any of your payment details.

Can I change the payment method anytime?

Yes, you can. Please contact me and we'd be happy to help you. Please note we generally collect payment for monthly services on the [1st] of each month. Please contact me at least 24 hours prior to the [1st] to ensure your next monthly payment will be taken from your preferred payment method.

What if I want to ask a question?

You can ask questions directly on the proposal at the very bottom. You'll be notified of my responses via email and you'll be able to view those responses and continue the conversation at any time on your online proposal.

What does the payment summary mean?

The summary shows you:

- The services we will perform for you during the period of engagement stated on your online proposal (click on each service to expand them for more detail).
- The fee for each service
- How frequently you will be asked to pay for the services performed:
 - **What does on acceptance mean?** Services under "On Acceptance" will be charged immediately, as soon as you accept the agreement.
 - **What does Recurring mean?** The fees for these services will be collected once a month on the [1st], throughout the engagement period for clients on packaged services.
 - **What does On Completion mean?** The fees for these one-time services will be collected once you have been notified, and agreed, that the work is complete.
 - **What does estimate mean?** Just like on completion, the fees for these one-time services will be collected once you have been notified, and agreed, that the work is complete, however the final fee will be determined once the work is complete.

ADVANCED

ACCOUNTING AND ADVISORY

Troy Andrew Tatam, **Advanced Accounting and Advisory** has sent you the following proposal to review.

Tatam, Troy

20 July 2018 - 20 July 2019

1

Summary

Click each service to view a more detailed description.

On Completion **\$4,300.00**

✓ Individual - Tax Returns \$300.00

Preparation of Individual Tax Returns, including but not limited to:

- Salary and Wages
- Dividends, Distributions and Interest income
- Rental property schedules
- Capital Gains calculations
- Deductions

Please note: one-off complex transactions or an increased scope of work may not be included in the estimated fee, these could include but are not limited to:

- Complex capital gains calculations,
- Additional Rental Properties and/or other investments,
- Unique complex taxation transactions.

> Trust - Quarterly Accounts and Annual Tax Return **\$2,500.00**

> Company - Quarterly Accounts and Annual Tax Return **\$1,500.00**

Included Services

> Please note: not included in proposal

Total Amount **\$4,300.00**

All prices are exclusive of tax

Expand scope of services.



2

Review, Sign & Accept

Please read your terms of service as it contains important information regarding the scope and conditions of this proposal. To electronically sign, type your name, accept the terms and click accept proposal.

Confirmation of agreement for services between: **Advanced Accounting and Advisory and Tatam, Troy**

This is to confirm our understanding of the terms and objectives of our engagement and the nature and limitations of the services we will provide.

Purpose, Scope and Output of the Engagement

Advanced Accounting and Advisory will provide professional services at your request. The details of the services provided in this agreement are detailed below:

Troy Tatam

Individual - Tax Returns
Preparation of Individual Tax Returns, including but not limited to:

[View PDF](#)

I accept the above terms

By clicking accept, you agree to the terms of this proposal. If you have any questions please don't accept and submit your question in the section below.

Type your name here...

✓ Accept Proposal

Have Questions?

Please submit any questions you have and we'll get back to you shortly.

Post Comment

Accept the terms of proposal.

View pdf version.

If you have any queries, enter here.