Are we the ideal choice for you?

Let's find out.

Not all business advisory firms are the same and likewise, not all businesses are the same.

Our highest priority is providing the best possible outcomes and value to our partnering businesses by providing tailored advice which aligns with your business and personal goals.

Developing tailored solutions for you requires our specialist advisors to be fully informed about your current and future wealth position and includes information from several areas, not just your financial position.

The development of your wealth profile requires you to be fully engaged in the advisory process. Putting it simply, the more you value the advice we provide, the more value we can provide as your business advisors.

All businesses will reach a time when they are ready for this level of advice.

When do you know it's time? Consider the following questions:

Are you looking for personalised advice that aligns with your business and personal goals?	☐ **Yes**
Are you willing to share your current and future wealth position, including areas beyond just finances?	☐ **Yes**
Are you ready to commit to further development of your business?	☐ **Yes**
Are you ready to be fully engaged in the advisory process and will value the advice we provide?	☐ **Yes**

If you answered yes to these questions, we are delighted to invite you to complete the Prospect Customer Profile that follows.

If you feel you are not yet ready to commit that is OK. The best outcomes are achieved when you are truly ready. Please keep us in mind when the time comes.

Prospect Customer Profile

Confidential

This Customer Profile is a questionnaire designed to provide your Advisor with the personal and financial information required to develop appropriate advice to meet your needs and personal circumstances.

We ask that you complete this document to the best of your ability. We can assist you to complete any gaps in the follow-up meeting which will be scheduled once we receive your questionnaire.

Disclaimer: *The contents of this Customer Profile are for the sole use of EnVision Partners. The details will be treated with the utmost confidentiality in accordance with our Privacy Policy. To view our privacy policy, go to: www.envision.com.au/privacy.*

PLEASE COMPLETE AND RETURN TO OUR OFFICE:

58 Heeney Street, Chinchilla QLD 4413
admin@envision.com.au

Your Name:

Will our services fit for your needs?

We're excited to get to know you better and see how we can best assist you. These personas represent the types of individuals or businesses that are most likely to benefit from what we offer and align with our values. If none of these personas resonate with you, our services may not be the best fit for your specific needs or requirements.

Please take a moment to select the persona that resonates with you:

FROM SURVIVING TO THRIVING

You have been operating for a while, but your business is facing challenges that are affecting its growth and effectiveness.

Cashflow is tight, you are struggling to pay your superannuation and GST liabilities.

You think your business is making a profit, but you do not understand where the money has gone.

You're working big hours, not seeing your family and there is not enough money to show for your efforts.

You know you need to make a change, but you do not know where to start. You're seeking an accounting and business advice solution that will shine the light on what actions you can take to change the direction of your business for the better.

BUSINESS MOVER & SHAKER

You own a well-established small business, and you're keen to grow. You have some plans to grow the business, but you want to make sure you can manage this growth.

You have unanswered questions but feel you have outgrown your current adviser(s) and the advice from family and friends. You have heard the saying that many businesses go broke making a profit and you do not want to be one of them.

You understand that specialised advice will help you make the most of the opportunities to achieve your goals.

You're seeking an accounting, tax and business advice solution that is logical and organised, includes high-level technical expertise but is delivered with empathy, support and a genuine commitment to helping you achieve your business success and lifestyle goals.

It's time for an advisor who is just as excited about your business as you are.

BRING HOME THE BACON

You know where you want to be financially, now you need the roadmap to deliver it.

Your business is generating good profits and cashflow, but you are not confident your financial affairs are the best they can be.

The mission is now to extract some value out of the business you have built via a sale or exit strategy.

It's time to take some money off the table.Let's bring home the bacon!!

You want to grow your wealth, reduce your risk, and leave a secure legacy for your family.

You're seeking a strategic advice solution that will review your "Big Picture" and will provide you with peace of mind that you have it all sorted.

About You

	Customer 1		Customer 2	
Title				
Surname				
First name				
Second name				
Preferred name				
Home address				
Postal address				
Business address				
Home Telephone				
Business Telephone				
Mobile				
Email				
How do you prefer to be contacted?	☐Phone	☐SMS	☐Email	☐Post
Primary Contact (who is the best contact person?)				
Date of Birth				
Place of Birth				
Marital status				
Referred by or how did you hear about us?				
Do you have a myGov ID? *Please note: This is this is different to your myGov Account.*	☐Yes	☐No	☐Yes	☐No
Is your myGov ID linked to your ABN?	☐Yes ☐No	☐Not applicable	☐Yes ☐No	☐Not applicable

	Sex	Full name	Date of birth	Financial dependant Y/N	Dependant until age	Married Y/N	No. of Children
Children							

Which products and services interest you?

Compliance Services:

- ☐ Tax & GST Compliance
- ☐ GST
- ☐ CGT Calculations
- ☐ Company Secretarial Services
- ☐ FBT
- ☐ Superannuation & Self-Managed Super Funds
- ☐ Bookkeeping System Review
- ☐ QBCC Financial Review
- ☐ Trustee & Director Obligations

Business Development Services:

- ☐ Chief Financial Officer Services
- ☐ Preparing Your Business for Sale
- ☐ Ownership & Structures
- ☐ Succession Planning
- ☐ Estate Planning
- ☐ Deed Vault
- ☐ Wealth Builder Program
- ☐ Investment Advice
- ☐ Buying or Commencing a Business
- ☐ Budget & Cashflow Forecasts

Newsletter and Educational Content:

EnVision Partners publishes quarterly newsletters and other educational content specific to topics relevant to you. If you do not want to receive this information, please tick here: ☐ Unsubscribe

Taxation Compliance & Business Advisory Products Questionnaire

☐ Not applicable (skip to last page)

An Overview of Your Business

	Select your answer		
Do you have any ABN?	☐ Yes	☐ No	
How long has your business been in operation?	☐ Less than 2 years	☐ More than 2 years	☐ Not applicable

What is your business/business name?

Number of locations:

List of Services offered:

Your Business Objectives

What are your financial objectives?

Note: we will discuss your objectives with you in detail at the first interview. Use this space to outline what you wish to achieve as a guide for this discussion.

Short Term Objectives:

Long Term Objectives:

Are there any special personal, family or business circumstances that you wish us to take into consideration?

Your current Trading Entity/Structure

Please select the applicable option/s:		
☐ Sole Trader	☐ Partnership	☐ Discretionary Trust
☐ Unit Trust	☐ Company	☐ Self-Managed Superannuation Fund

Are you an employer?	☐ Yes	☐ No
If so, how many people do you employ?		

If you are an employer, are you up to date with your Superannuation Guarantee obligations for your employees?	☐ Yes	☐ No

What are the biggest challenges/concerns with your business?

What type of bookkeeping system are you using? (please select)		
☐ Phoenix	☐ QuickBooks	☐ MYOB
☐ Xero	☐ Reckon	☐ Intuit

How would you describe the organisation of your records at your home/office?

	Select your response		
Would you like assistance with your bookkeeping & systems?	☐ Yes	☐ No	☐ Not applicable
Do you complete your own Activity Statements?	☐ Yes	☐ No	☐ Not applicable
Do you owe money to the ATO?	☐ Yes	☐ No	☐ Unsure
Are you up to date on your ATO lodgement?	☐ Yes	☐ No	☐ Unsure
Do you or other related persons or entities have any investments? Eg. Shares or managed super funds etc	☐ Yes	☐ No	☐ Unsure

Your current situation and expectations

What are your expectations of your accountant and other professional advisors?

How often would you like to meet with your accountant?

What is your annual accountant budget?

Have you informed your previous accountant that you are meeting with us?	☐ Yes	☐ No

What are the biggest challenges/concerns with your current accountant?

What is your current fee relationship with your accountant?

Do you have an outstanding balance with your previous accountant?	☐ Yes	☐ No

Seeking Advice Questionnaire

☐ Not applicable

Reason/s for Seeking Advice

Please take the time to state your reasons for seeking advice
(e.g. purchasing a rental property, Capital Gains Tax question of the sale of asset, etc)