



INVESTMENT PLUS
ACCOUNTING GROUP

ACCOUNTING

Accounting
Asset & Wealth Protection
Business Advisory
Property Tax Advisory
Superannuation Advisory
Taxation & Compliance
Finance & Loans

TAXATION

BALANCE

PLANNING

STRATEGY



Accounting

Falling behind in your tax obligations is one of the major causes of failure for Australian businesses. In an increasingly complex tax environment, keeping up to date with taxation regulations is an absolute must for businesses of any size or industry. Our team of advisors will work with you and your team and share their knowledge and expertise to help provide transparency when it comes to all things tax.

Whether you are an established business that has been trading for some time or a start-up launching your new business venture, our advisors work with you to make a difference that really works to improve your performance and achieve genuine growth, all whilst adhering to current taxation laws.

Our clients range from Small to Medium Enterprises (SME) across a wide range of industries

We offer a comprehensive and holistic suite of business services including:

- ✓ Companies
- ✓ Management Accounts
- ✓ Individuals
- ✓ Partnerships
- ✓ Sole Traders
- ✓ Property Trusts
- ✓ Self Managed Superannuation Funds (SMSFs)
- ✓ Trusts
- ✓ Testamentary Trusts



Asset Protection | How to effectively protect your assets

It can take a lifetime to grow your wealth and asset base, but only a moment in time for it to be lost and taken away. Asset protection is the use of smart, legal strategies to protect your assets. Most people have insurance to protect against risk, but no insurance can cover every possible scenario, and you may not know which insurances are needed to protect against the unique risks you face.

- What are the safest asset protection strategies?
- What is the risk without having asset protection strategies in place?
- What is a testamentary trust?
- How can a testamentary trust be utilised to minimise tax?
- Do I still need asset protection if I have insurance?

Our services include:

- ✓ Investment Structures
- ✓ Retirement Planning
- ✓ Estate Planning
- ✓ Testamentary Trusts



Business Advisory

Starting a successful business takes more than just a good idea and hard work. There are bureaucratic, legal, administrative and financial considerations that you should consider, even before you commence. At Investment Plus Accounting Group we provide a comprehensive range of business services to guide our clients.

If you're thinking of starting a business, it's also a must to consider which business structure best suits your needs. When considering which structure is right for you, 2 major considerations are:

- Legally minimising taxes
- Protection of your assets

Our services include:

- ✓ Audit Insurance
- ✓ Bookkeeping
- ✓ Business Activity Statement
- ✓ Business Finance
- ✓ Cloud Based Accounting Support
- ✓ Corporate Secretarial (ASIC)
- ✓ Government Grants
- ✓ Management accounts
- ✓ Single Touch Payroll (STP) Reporting
- ✓ Small Business CGT
- ✓ Succession Planning
- ✓ SuperStream
- ✓ Tax Planning

Property Tax Advisory

At Investment Plus Accounting Group, our specialist property tax accountants are renowned for their reliable tax advice and property tax accounting services for property investors.



Structuring your investment portfolio for better asset protection.



Improving cash flows of your property portfolio by deducting various depreciation expenses.



Property investment strategies that can legally reduce taxes.



Claiming all tax deductions that you are legally entitled to.



Getting access to competitive ultra low interest investor loans through our Finance team.



Knowing how to safely structure your debt to purchase investment properties.

Our services include:

- ✓ Audit Insurance
- ✓ Capital Gains
- ✓ Depreciation Reports
- ✓ Investment Structures
- ✓ Land Tax
- ✓ Margin Schemes
- ✓ Negative Gearing
- ✓ Property Finance

Superannuation Advisory

A self managed superannuation fund (SMSF) is a superannuation fund that is managed by you. An SMSF allows you to take control over the investment strategy of the fund. It also provides greater flexibility in terms of investing the funds' assets, retirement income options and estate planning; but it is important to understand the responsibilities that come with being a SMSF trustee.

Our services include:

- ✓ SMSF Setup
- ✓ Contribution strategies
- ✓ SMSF Borrowings
- ✓ Retirement Planning
- ✓ Pension Strategies
- ✓ SMSF Windup

Superannuation & Strategic Planning advice throughout key stages of your product life cycle.

SMSF Structure
Establishment of Trust Deeds

SMSF Loans
Loan structures to purchase property in Super with debt / Borrowing in Super to buy property and other assets.

Investment Strategy
SMSF review, implementation & Performance management

Administration & Compliance
Trust Deed Reviews, Annual SMSF Audits & Tax Returns, Ongoing SMSF Trustee education

Taxation & Compliance

We specialise in business, SMSF, personal and property investor tax compliance services. We conduct regular annual tax reviews to identify a range of options to optimise your tax planning. We provide clients with options for their business and personal structures, to reduce your tax as well as understand the benefits of effective tax planning.

Income Tax Preparation & Planning

- Income tax and capital gains tax planning and implementation
- A tailored approach to income tax consulting
- Specific tax rules relevant to high net wealth individuals
- Dispute resolution with the Australian Taxation Office
- Preparation and lodgement of annual income returns
- Specific advice in relation to investment properties

Our services include:

- | | | |
|-------------------------------------|---|--|
| ✓ Audit Insurance | ✓ Land Tax | ✓ Single Touch Payroll (STP) Reporting |
| ✓ Business Activity Statement (BAS) | ✓ Partnerships | ✓ Sole traders |
| ✓ Companies | ✓ Payroll Tax | ✓ SuperStream |
| ✓ Fringe Benefits Tax (FBT) | ✓ Property trusts | ✓ Testamentary Trusts |
| ✓ Individuals | ✓ Self Managed Superannuation Funds (SMSFs) | ✓ Trusts |

Finance & Loans

We provide a full suite of finance products and lending solutions. We cater for simple and complex requirements for individuals, business owners' and SMSFs including:

- Owner occupier home loans for first home buyers
- Loans for property investors
- Finance for Trusts and Investment Structures, including Self-Managed Superannuation Funds
- Business loans for Commercial Real Estate
- Finance for Property Renovators & Developers
- Leasing
- Re-financing for a better deal, lower interest rate loans or more flexible re-payments

We regularly review client portfolios to identify opportunities for them to save and assist with renegotiating a better deal with their current lender or seek out a better loan from a different lender. Talk to our finance team to find a better loan rate.

Why Choose Investment Plus Accounting Group

Property Tax Specialist

We are specialist property tax accountants renowned for reliable tax advice and property tax accounting services for property investors.

We assist property investors with the following:

- Ownership Structure planning and asset protection
- Tax Planning & Tax Returns
- CGT, GST and Margin Scheme

Small to Medium Business Tax Specialist

The last 20 years of industry experience taught us no two businesses are the same because different individuals operate them. Success could mean completely different things to different individuals.

Our business tax accountants and business specialists work closely with you to meet your personal business goal, strategic planning, succession planning, and use structure to create better tax planning and asset protection.

Industries Serviced

Our team has experience doing bookkeeping, BAS and Annual tax returns for clients ranging from but not limited to start-ups:

- Family Owned Businesses
- Real Estate Businesses And Sophisticated Investors
- Mortgage Businesses
- Property Developers
- Engineering And Manufacturing
- Medical And Dental Practice
- Law Firms
- Labour Hire Companies

Superannuation Tax Specialist

Our team understand that every decision you make regarding your super will impact your retirement. We know how critical it is to have a solid foundation for your superannuation investment journey. We collaborate with a reliable, trustworthy, and expert team of advisors in the industry to help you achieve your financial objectives. Our wealth management team can help you identify and achieve a realistic superannuation goal. If the plan is to purchase a property in the SMSF, our wealth management team and finance team can work together to achieve the best possible result for your retirement objective.



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