



SUPERIOR TAX SOLUTIONS

EXPRESSION OF INTEREST - ACCOUNTING SERVICES

Your full name: _____

Preferred Contact Ph Number: (incl. area code) _____

Email address: _____

WE'RE INTERESTED IN FINDING OUT MORE ABOUT YOU. WOULD YOU PLEASE PROVIDE THE FOLLOWING INFORMATION:

WE APPRECIATE THE MANY REFERRALS WE RECEIVE FROM OUR SATISFIED CLIENTS. PLEASE ADVISE WHO IT WAS THAT REFERRED OUR SERVICES TO YOU _____

WHAT ARE THE REASONS YOU ARE ENQUIRING ABOUT OUR SERVICE? (please tick)

- I want to minimise my tax and maximise my deductions
- I want to know what my options are for Asset Protection
- I want an Accountant who specialises in property
- I want some pro-active Tax Planning advice
- I want to set up a Trust or Self Managed Super Fund or other structure
- I want ongoing advice regarding my SMSF
- I would like assistance analysing the cost of my next property purchase
- I want to increase my knowledge via the tailor-made STS Teleconferences and newsletters
- I want access to the STS Wealth Creation Team
- I want personalised Tax advice on my current circumstances

PLEASE RATE THE FOLLOWING: 1 = EXTREMELY 3 = MODERATELY 5 = NOT AT ALL (please circle)

If we can show you ways of improving your current situation, how motivated are you to take action and come on board with STS? **1 2 3 4 5**

How many rental properties do you own? _____

If you are currently in the process of purchasing a property, when will this settle? DATE: _____

If you own a business, is the current annual turnover over \$200,000? YES/NO

What amount do you have in Superannuation? \$ _____

Can you access this Super Fund money to roll into your own Self Managed Super Fund if you set one up? YES/NO

If so, when do you intend on setting it up? (please circle) 1 year / 2 years / 3 years / 4 years / 5 years

Do you have your own self managed super fund and if so, what is the name of the Fund? YES/NO

Do you wish to purchase a property in your Self Managed Super Fund, or find out more about this? YES/NO

**PLEASE RANK THE FOLLOWING CONSIDERATIONS IN ORDER FROM 1 – 4. BASED ON THEIR IMPORTANCE TO YOU:
1 = MOST IMPORTANT / 4 = LEAST IMPORTANT**

- Price
- Quality of Advice
- Provision of additional services, mentoring and education
- Accountant has personal knowledge and experience in investing and wealth creation

PLEASE RATE THE FOLLOWING (please tick):

How prepared are you to invest in yourself?

UNPREPARED	MILDLY	MODERATELY	VERY	EXTREMELY
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

**THANK YOU FOR YOUR ENQUIRY
OUR OFFICE WILL BE IN CONTACT WITH YOU SHORTLY**