



Mukiwa Accounting
Services

2021 TAX PLANNING

Delivering you the very best in
tax planning advice, strategies
& savings

OUR 2021 TAX PLANNING PACKAGE

The 2021 financial year has undoubtedly been the most challenging year for us all, from both a business and personal perspective.

A degree of business uncertainty remains which will require business owners to remain agile, strategic and focused on their numbers, operations and direction.

Whilst government economic stimulus measures undoubtedly helped and were a welcome relief, what may not be so welcoming is the tax implications of these initiatives.

Therefore strategic planning before 30 June 2021 is imperative.

Here at Mukiwa we have developed 4 different year-end planning packages, designed to ensure we cover all client types and needs.



Next Steps

- ☐ **Select your Package**
Review the 4 tax planning packages below and decide the one that is most appropriate to your needs.
- ☐ **Complete the Intent to Proceed & pre-meeting Questionnaire**
[Click here](#) to let us know your chosen plan and complete the online questionnaire.

Your answers will ensure you get the most out of the tax planning review and all issues important to you are considered as part of our recommended strategies.
- ☐ **Update your accounting file**
If you perform your own bookkeeping, ensure your accounting file is completely reconciled & up to date.
- ☐ **Meeting to discuss review**
We will book in a time to meet with you (in person or online) to discuss your results, estimated tax and our recommended tax planning & business strategies.



The Process

- 1 A detailed review of your accounting file is undertaken by our accountants, to ensure we are working off an accurate YTD trading position
- 2 A one-on-one meeting with you to review & discuss your business, understand your priorities, pain points & future plans. During this meeting we will:
 - Extrapolate the YTD results for your business to 30 June 2021
Forecast the 2021 taxable income of each member of your 'group'
 - Calculate the anticipated tax expense & liability for all taxpayers
 - Give consideration to a range of tax planning initiatives and strategies that may be undertaken to minimise your overall tax liability
- 3 A detailed report will be provided, confirming all that has been discussed and the strategies that could be implemented prior to year-end.
- 4 If you've selected the Planner or Entrepreneur packages, we will have a separate one-on-one meeting to cover cashflows & budgets, business strategies & financial healthchecks.

'The Estimator'

What's Included?

Estimate of taxable income, deductions and expected FY2021 tax position

Face-to-face (or online) meeting 0.5-1.5 hrs dependent on package

Your Takeaways

A summary of your estimated taxable position for the FY2021 year

No 2021 tax shock - guaranteed!



Individual



\$ 220

Sole Trader /
Small Business



\$ 385

Business / Family
Group



\$ 495

Complex Business
/ Family Group



\$ 715

All prices include GST

'The Strategist'

Includes 'The
Estimator'

What's Included?

Review of YTD trading performance, FY2021 full year estimate

Discuss various tax strategies & the impact they may have on your final tax position

Face-to-face (or online) meeting 1.5-3 hrs dependent on package

Your Takeaways

A summary of your estimated taxable position for the FY2021 year

Actionable tasks that can be implemented prior to 30 June, along with an estimate of your tax savings



Sole Trader /
Small Business



\$825

Business / Family
Group



\$ 1,045

Complex Business
/ Family Group



\$ 1,375

All prices include GST

'The Planner'

Includes 'The Strategist'

What's Included?

Everything covered by 'The Strategist' Programme

Preparation of a FY2022 monthly budget & cashflow forecast

Face-to-face (or online) meeting 2.5-4 hrs dependent on package (split over 2 meetings)

Your Takeaways

Everything covered by 'The Strategist' Programme

A month-by-month Budget & Cashflow report, giving you insights into the future

Especially useful when imported into your accounting software for tracking against actuals



Sole Trader /
Small Business



\$ 1,100

Business / Family
Group



\$ 1,375

Complex Business
/ Family Group



\$ 1,760

All prices include GST

'The Entrepreneur'

Includes 'The Planner'

What's Included?

Everything covered by 'The Planner' programme

An open and honest discussion to review your current business position, challenges & pain points, opportunities, strengths & weaknesses

Face-to-face (or online) meeting 3.5-5 hrs dependent on package (split over 2 meetings)

Your Takeaways

Everything covered by 'The Planner' programme

A list of actionable items to adopt & implement in your business, along with a Power of One analysis to show you the impact these actions could have on your business

A Financial Safety Checklist which you can apply to both your personal & business life



Sole Trader /
Small Business



\$ 1,650

Business / Family
Group



\$ 1,980

Complex Business
/ Family Group



\$ 2,475

All prices include GST