



Mukiwa Accounting
Services

2023 TAX PLANNING

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

OUR 2023 TAX PLANNING PACKAGES

With the current macro economic conditions, a degree of business uncertainty remains. Business owners need to remain agile, strategic and focused on their numbers, operations and direction.

Strategic planning before 30 June 2023 is therefore imperative.

We have 2 different year-end planning packages, designed to ensure we cover all client types and needs.

On completion of your tax planning session, you will receive our complimentary Personal Budget Template



Next Steps

- Select your Package**
Review the 2 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 2023
Forecast the 2023 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 Entrepreneur package, we will have a separate one-on-one meeting to cover cashflows & budgets.

'The Strategist'

What's Included?

Review of YTD trading performance, FY2023 estimate

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

Includes face-to-face (or online) meeting
1.5-3 hrs

Your Takeaways

A summary of your estimated taxable position for the FY2023 year

An easy to read and beautifully presented report outlining actionable tasks that can be implemented prior to 30 June, along with an estimate of the tax savings



Sole Trader /
Small Business



\$750

Business / Family
Group



\$ 975

Complex Business
/ Family Group



\$ 1,300

All prices include GST

'The Entrepreneur'

Includes 'The Strategist'

What's Included?

All of the above

Preparation of a FY2024 monthly budget & cashflow forecast

Includes 2nd face-to-face (or online) meeting 1.5-2.5 hrs

Your Takeaways

All of the above

A 2024 monthly Budget & Cashflow for you to import into your accounting software for tracking against actuals



Sole Trader /
Small Business



\$ 1,000

Business / Family
Group



\$ 1,400

Complex Business
/ Family Group



\$ 1,650

All prices include GST