

## ANNUAL CLIENT FUNCTION

# Globe BD's Service Delivery Flagship

**A virtual on-site financial advisor**

Since our last newsletter in July, Globe BD has had numerous inquiries about the Fixed Price Agreement (FPA) programs. So, hot off the press, here is a rundown of our FPA's on offer:

**Gold:** Globe BD wants all its clients to aspire to a **Gold** FPA – this is where we become an integral part of your business, offering not only a comprehensive tax and compliance regime, but a specifically tailored business development program. Globe BD will conduct an extensive diagnosis of your business, identifying key issues to address in the short, medium and long terms. From this diagnosis, together we develop a blueprint for your business plan which is prepared as part of the **Gold** package. Our current **Gold** clients are among our biggest and most successful. This program also includes all **Silver** and **Bronze** privileges.

**Silver:** Is for those growing businesses which are not quite ready to take the leap – but are preparing for it. Globe BD assists in:

- setting and monitoring Key Performance Indicators
- reviewing monthly actual v budget figures
- monitoring the 5 cash drivers – debtors, creditors, stock control, cost of goods sold and overheads
- introducing a business development plan
- meeting with you regularly to monitor finances and profitability
- free attendance for two people to attend Globe BD seminars
- introduction to business planning and
- all services in our **Bronze** program.

**Bronze:** This program provides complete, but basic, accounting and tax compliance. It is ideal for all our clients and we encourage this as the beginning of our relationship with you. From here you choose to progress to **Silver** or **Gold**.

Our comprehensive accounting and tax preparation **Bronze** program includes:

- unlimited meetings and phone calls with your accountant (no more 6-minute billing intervals)
- all preparation of BAS, IAS, FBT, Company, Trust, Sole Trader, Partnership and other similar tax returns
- regular overviews of financial situation – are you making your company work for you, or are you a slave to the company?
- regular overviews of organisational structure – are you in the best company/partnership/trust configuration?
- constant overview of tax situation – tax planning to legally minimise tax liabilities

## David 'BOONY' Boon

The 'dead-set legend' will be guest speaker at this year's Annual Client Function

Hear the man behind the moustache

Have lunch with the  
'short backward square'

Batting style	Right-handed batsman (RHB)	
Matches: Tests/ODI	107	181
Runs scored	7,422	5,946
Batting average	43.65	37.04
100s/50s	21/32	5/37
Top score	200	122
Catches/stumpings	99/0	45/0

David Boon will be the guest speaker at Globe BD's Annual Major Client Function  
Friday 9<sup>th</sup> November 2007

12noon – 3.30pm

Perth Football Club

Goddard Street, Lathlain

Boony's address will be followed by an auction of sporting memorabilia

All proceeds of the event go to the Jacob Western Fund at Princess Margaret Hospital for Children

Cost of the three course lunch including beer, wine and soft drinks is \$110 per person  
Bring spare change for the raffles.

Contact Globe BD on T: 9456 3303, F: 9456 0091  
or email: [admin@globebd.com.au](mailto:admin@globebd.com.au)  
for further information & registration

**“Ok, so that’s the FPA in a nutshell. But I already pay to have that work done. Why do I need to go on a monthly agreement?”**

Globe BD’s FPA programs allow you to manage your finances better – with regular, known, monthly fees – no end-of-year surprise accountants’ fees. This will be a bonus to your cash-flow. But, the biggest advantage is having a virtual on-site financial adviser:

- someone you can ring or meet several times a week
- someone who will visit your place of work
- someone who will understand your business as well as you do
- someone who will prompt you to look at your tax situation before it is too late to minimise
- someone who understands and is trained to look after your financial welfare
- someone who will talk to the ATO bureaucrats on your behalf – saving you even more money by us hanging on the phone while you grow your business

**“There are two sides to a coin – so what’s in the FPA program for Globe BD?”**

We can plan our workload throughout the year so we can offer you the most efficient and effective turn-around time for your financial and taxation needs.

Clients who enjoy FPA programs are the easy ones to turn-around. We know what the financial and tax situations are because we work on them all year. We know when the work will come into the office. We know how long it will take to complete. We know of any special needs you may have. So we can plan our workload to be more efficient and effective. And of course, we know you will pay us on time! We are all in business to succeed, not fail under accounts receivable.

Also, one of Globe BD’s business aims is to do away with the timesheet – the 6-minute intervals – 10 intervals in an hour – at which you are currently charged for ‘work in progress’. If the job takes us longer – we wear the cost. If we are more efficient – you gain by better turn-around and information delivery.

**“How much will it cost me?”**

Probably not as much as you think – in fact, in the long term you will save money by running your business better. To work out your monthly fee, we average what it will cost you for a year and divide by 12. A direct debit is set up and you never again feel the pain. Every FPA agreement is reviewed annually.

Some comments from attendees at our recent  
‘Developing a Great Business’ seminar

*“I thought it was good. Every time I attend one of these seminars I am reminded of what we should, but are not, doing.”*

*“Great. Well done!”*

*“Food for thought – things to work on.”*

**IT’S ONLY 14 WEEKS ‘TIL CHRISTMAS. DO YOU KNOW THE FRINGE BENEFITS TAX RULES FOR CHRISTMAS PARTIES? CALL GLOBE BD FOR AN UPDATE.**