

Richard A Bobb Chartered Accountants

## Strategic Tax Advice Guide

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# Strategic Tax Advice: From Compliance to Growth

At Richard A Bobb Chartered Accountants, we don't just prepare tax returns — we help you use tax strategy as a driver for growth and long-term success.

## Discovery Questions

1. What is your business type – individual, sole trader, partnership, trust, company or SMSF?
2. In which industry do you operate?
3. What is your annual turnover (AUD/NZD)?
4. How many employees do you have?
5. What is your gross payroll per annum?
6. Which stage of the business life cycle are you in – Startup, Growth, or Mature?
7. What are your key concerns or priorities? (e.g., minimising tax, GST compliance, structuring, payroll tax, succession planning)

## Strategic Insights You'll Receive

- Immediate tax obligation concerns (income tax, GST, PAYG, payroll tax if applicable)
- Industry-specific deductions and offsets you may be overlooking
- Common compliance risks in your industry and how to mitigate them
- Strategic tax planning aligned with your stage of growth
- How tax structure impacts your journey from self-employment to business ownership
- Recent ATO [or IRD] rulings or legislative updates affecting your industry
- Specific KPIs you should track to measure tax efficiency
- How your current tax approach may be limiting business growth potential

## Next Steps

Complete our short discovery questionnaire and book a consultation with our team.

**Together we'll transform your tax position from a compliance burden into a growth advantage.**