

# Your Taxation Essentials Service

Our Taxation Essentials service is an 'on the spot' service for most individual clients. This service has been specifically designed for people who want their taxation affairs to be easy and simple whilst taking much of the burden away as possible.

## Access to a dedicated team

Handling taxation issues can be stressful. As a Taxation Essentials service client you have access to a dedicated team of qualified and experienced accountants, who are here to help and you are free to contact them at any time.

Wouldn't it be nice to feel confident and in control of your tax obligations? **You can.**



## Ongoing taxation advice

We understand your life and circumstances change and realise that you may want more than a 'once a year' relationship.

A taxation consultant will always be on hand to answer your queries and provide you with taxation advice.

## Wealth management service

If you own investment or rental properties, XPAL will help you by advising on allowable deductions, depreciation, and assisting you in achieving the maximum possible refund.

### Your Taxation Essentials team



**Lara Alawattagama**  
MAcc CA



**Daniel Masullo**  
AdvDip Acc



**Taiseer Sayeed**  
B.Comm

## Income tax returns

No one likes to do their tax – but we make the process as painless as possible. We prepare your tax return using professional quality controls to ensure full declaration of income, maximization of allowable deductions and offsets, correct calculation of capital gains, losses and applicable discounts. We don't treat our clients like a number as every situation is different. We believe it's important to review your circumstances to ensure your structure is appropriate and planning provides you with optimal results.

## Capital gains tax advice

Thinking of selling your investments? At XPAL, we can estimate your liability before the transaction occurs so there are no hidden surprises.

## Ongoing client communication program

We enhance your understanding of taxation laws and current developments through our exclusive publications.

Our communications program ensures that there are no surprises, helping to keep you focussed on your goals.

You will receive our quarterly e-newsletter which features articles by guest writers and taxation articles as well as current updates and issues.

You will have access to our website. Save time and enjoy the convenience of rapid online access to our team through our website. It offers you the convenience of being able to access information relating to your tax affairs, as well as links to other websites that may be of interest.

## Seminars and client briefings

You will receive an invitation to our exclusive client briefings. These events frequently feature a lifestyle theme and are not always tax-focussed. Guest speakers often include prominent industry identities.



## Our commitment to you

- Treat you with respect, professionalism and honesty and maintain a non-judgemental attitude toward the goals and information you present to us
- Treat your financial and personal information with absolute confidentiality
- Treat your money with the same care and prudence that we would treat our own
- Help you to develop a realistic view of your position and expectations
- Highlight to you the need for additional advice where a specific need has been identified such as insurance, Centrelink assistance, retirement planning or transition to retirement strategies.

As part of our association with ipac south australia, we are now able to assist you with all things financial planning.



ipac is one of Australia's largest financial advisory firms and has been helping Australians make the most of their money and lives for over 30 years.

To make an appointment with one of our taxation essentials service professionals call 08 8291 2821 or visit [www.xpal.com.au](http://www.xpal.com.au).

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