

# *Request for Strategic Review* | Personal Advice. Global Perspective.

*Welcome & thank you for contacting us to conduct a strategic review of your affairs.*

We have significant expertise in relation to local and international tax and business advisory for private clients and we would be delighted to assist you to review your affairs. We are here to assist you and our goal is to ensure that we have a full understanding of your affairs so that we can help you to maximise your tax and business planning opportunities. We will design strategies with the aim to mitigate the risks, whether it be general or related to a particular matter.

## **How it works.**

Our approach focuses on ensuring that we are as prepared as possible for our first contact with you. This may be a face to face meeting, email, phone or Skype call. The aim is to provide you with the best possible advice at our initial contact and engage in meaningful discussions that are relevant to your particular circumstances.

### **1** *Tell us about yourself*

We ask that clients complete a Fact Finder document. The Fact Finder is always treated as highly confidential and will greatly assist by providing us with the background information about your financial and personal position, your current assets and liabilities, income levels and the specific queries you may have. We will review the completed Fact Finder, with the view to considering your questions and highlight specific tax and business planning issues and opportunities which you may not have previously considered.

### **2** *Meet with us*

After reviewing your Fact Finder we will meet with you either face to face or via internet conference to discuss the details of your personal circumstances, the information provided in your Fact Finder and will discuss the risks, business and tax planning opportunities that you may not have previously considered and any other issues you may wish to cover. We will also cover tax and business optimising strategies that will help to mitigate the tax and other risks which may be relevant to your personal circumstances.

### **3** *Meeting Summary*

After our meeting we will provide you with a written summary covering the issues discussed, with an outline of any additional work that may be required or points that need addressing.

# Request for Strategic Review

## 4 Moving forward

In providing you with specialist advice we commit significant time to understanding your personal circumstances and to delivering our advice in a detailed yet concise manner. For this reason our costs to undertake the strategic review of your affairs would be \$2,500 NZD + GST if applicable. Should you wish to move forward please complete the following "Engagement Terms for Strategic Review" and email the completed document to us.

Once received, we will forward you our Fact Finder to commence the review and advice for you.

Should you have any queries please contact: **Nigel Smith or Martina Evans**

T: +64 9 307 1777 E: nigel@covisory.com E: martina@covisory.com

### ENGAGEMENT TERMS

**I, request Covisory Partners Limited (CPL) to undertake a strategic review of my tax and business affairs in accordance with the following terms.**

#### *Scope and Delivery of Advice*

The strategic review will be delivered as follows:

- Review of completed Fact Finder;
- Meeting with you to discuss your affairs;
- Provision of written summary of the issues discussed and advice provided,
- Professional fees for addressing the above matters would be \$2,500 NZD + GST.
- Where subsequent meetings are requested these will incur professional fees
- at the rate of \$625 NZD + GST if applicable per hour.

#### *Payment Terms*

A progress invoice of \$1,250 + GST in relation to the Strategic Review will be issued to you upon receipt by Covisory Partners of the completed Fact Finder; Upon receipt of your progress payment we will proceed with the Review.

A final invoice of \$1,250 + GST in relation to the Strategic Review will be issued immediately after our meeting. Upon receipt of the fees we will provide you with the Meeting Summary and our suggested course of action. Payment of this invoice is due within 7 working days from the date of issue of the invoice.

### CLIENT ACCEPTANCE

I  accept these Engagement Terms and agree to paying Covisory Partners the amount of \$2,500 NZD + GST in relation to the Strategic Review in accordance with the Payment Terms above.

#### *Payment Methods (please tick method using)*

**By Internet Banking:**  Bank account #: 06-0293-0089060-00  
(Please include STRATREV as a reference)

**By Credit Card:**  Via our secure DPS online portal on our website  
[www.covisory.com/payments](http://www.covisory.com/payments)

Signature \_\_\_\_\_

Your Email Address \_\_\_\_\_

Date \_\_\_\_\_

(so we can send the fact finder to you):

**Covisory**  
PARTNERS