

This work is not necessarily difficult. It is more about being organized, collecting, collating and checking information throughout the year.

Systems, processes and checklists are critical for the controlled flow of this work. The volume of work is high with lodgement deadlines to be met. It is important that the 'right' team members are completing each part of the process.

Having access to this level of financial information we are in a very privileged and fortunate position. This information can be used as the basis to help clients further so we deliver Client Fulfillment and live up to our Core Purpose.

↑ ↑ ↑ Move up.

The 'Are You Financially Secure' process:

At Mulcahy & Co. we are in a unique position to provide the expert advice and solutions of accounting, financial planning, lending, legal and information technology all under one roof. This makes a normally complicated process seamless to help you on your way to becoming financially secure.

What does being Financially Secure mean?

It means assessing your personal and business goals, and developing a plan to achieve them. Follow our 10 STEPS TO SUCCESS to achieve FINANCIAL SECURITY.

1. Goals and Objectives
2. Estate Plan
3. Risk Plan
4. Asset Protection Plan
5. Taxation Plan
6. Debt Plan
7. Retirement Plan
8. Business Plan
9. Superannuation Plan
10. Investment Plan

Can you please make into
diagram similar to next
page?

* We use on most of our
flyers *

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FOLLOW OUR 10 STEPS TO SUCCESS TO ACHIEVE FINANCIAL SECURITY...
Visit www.mulcahy.com.au for more information



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