



Core Pro Letters (Merge) Templates as at Oct 2021

Activity Statements & Annual Reports

- Activity Statement - (IAS) Income Tax Instalment Notice
- Activity Statement - (IAS) Instalment Activity Statement - First Quarter
- Activity Statement - (IAS) Instalment Activity Statement
- Activity Statement - (IAS) PAYG Tax Withheld
- Activity Statement - Activity Statement Refund Reduction
- Activity Statement - Annual GST Return for Client to Prepare
- Activity Statement - Annual PAYG Instalment Notice
- Activity Statement - BAS for Client to Prepare
- Activity Statement - BAS IAS for Client to Sign and Report
- Activity Statement - Defaulted Arrangement
- Activity Statement - Failure to Lodge on Time
- Activity Statement - Overdue Activity Statement
- Activity Statement - Overdue Annual GST Return
- Activity Statement - Overdue Annual PAYG Report
- Activity Statement - Quarterly GST & PAYG Instalment Notice
- Activity Statement - Quarterly PAYG Instalment Notice
- BAS Information Request

Advice - Tax & Accounting ASIC Compliance

- Accounting & Tax Advice Letter
- ASIC Agent Appoint & Change of Address
- Change of Company Officeholders
- Change of Business Address
- Change of Officeholder Address
- Change of Registered Office Address
- Change of Shareholder Address
- Change of Company Name
- Change of Officeholder Name
- ASIC Annual Review Cover & Instructions
- Allotment Issue of Shares in Company
- Transfer of Shares in Company
- Transfer of Units in Trust
- Allotment Issue of Units in Trust
- Voluntary Deregistration of Company
- Change of Trustee - Unit Trust

Assessment Notices

- Notice of Assessment - Amended
- Notice of Assessment - Excess Concessional Contributions
- Notice of Assessment - Land Tax
- Notice of Assessment
- Notice of Assessment - Nil Amount After Payment
- Notice of Assessment - Nil Refund or Payment
- Notice of Assessment - Paid Tax for Client
- Notice of Assessment - Division 293 Tax

Business Services & Virtual CFO

- Due Diligence - Proposed Purchase of Business

	Due Diligence - Request for Information
	Business Startup Advice - Client Obligations Letter
	Business Sale Preparation - Items to Consider Letter
Client Administration	Client Feedback - Questionnaire Cover Letter
	Client Feedback - Thank You Letter (Negative)
	Client Feedback - Thank You Letter (Positive)
	Accountants Confirmation Letter
	Jury Duty - Request for Exemption
	Tricky Conversation - Client wants to Lodge ASIC Documents themselves
Client Deletion	Tricky Conversation - Client wants to take over looking after their Company Registers
	Letter to Fire Client
	Reply to Ethical Letter
	Ethical Letter to Client re info for New Accountant
Client Engagement & Proposals	New Client - Action Plan with Proposal Estimate
	New Client - Welcome Email
	New Client - Letter with Terms of Engagement
	Existing Client - Letter with Terms of Engagement
	Fixed Price Agreement Proposal Letter
	Additional Work Order Notice
	Letter Offering Accounting Services
	Email with up front Quote for Meeting + Further Advice
	Single Touch Payroll (STP) - Engagement Authority SIMPLIFIED
Debtor Management	Interim Invoice Enclosed
	Overdue Debtors - FIRST Letter
	Overdue Debtors - SECOND Letter
	Overdue Debtors - FINAL Letter
	Debtors Invoice - Thank you for your Payment
Ethical Clearance	Ethical Clearance to Previous Accountant
	SMSF Ethical Clearance to Previous Accountant
Fringe Benefits Tax (FBT)	FBT Summary Report Cover Letter
Other ATO Correspondence	ATO Notice - Excess Contributions Tax
	ATO Notice - Fuel Tax Credit Rate Changes
	ATO Notice - General Correspondence
	ATO Notice - Interest Income Tax Return
	ATO Notice - Role of Director of SMSF Corporate Trustee
	ATO Notice - Superannuation Co-Contribution Remittance Advice
	Individual ITR - Reminder of Tax Time Letter
Overdue ATO Reminders & Penalty Notices	Overdue Notice - General Interest Charge (GIC)
	Overdue Notice - Overdue Payment Reminder
	Overdue Notice - Penalty for Failure to Lodge Tax Return on Time & Statement of Acco
	Overdue Notice - Tax Return Late Lodgement Penalty
	Overdue Notice - Tax Return Lodgement Final Notice
	Overdue Notice - Tax Return Lodgement Reminder
SMSF Admin	SMSF - New Event-Based Reporting Requirements
	SMSF Setup - Initial Docs to Sign

Holding Trust Setup - Initial Docs to Sign

Statements of ATO Accounts	Statement of Account - Income Tax Statement of Account - Integrated Client Account (RBA Statement) Statement of Account - Payment Arrangement Statement of Account - Refund of Overpaid Tax
Structure Setups (Company & Trusts)	Company Setup - Initial Docs to Sign Company Setup - Bank Account Kit Company Setup - Final Letter Trust Setup - Initial Docs to Sign Trust Setup - Bank Account Kit Trust Setup - Final Letter
Tax Planning	Tax Planning - Letter Invitation to Meet and Provide Info Tax Planning - Letter Invite & Info Request Reminder TAX PLAN Report Cover Letter Pre-Year End Meeting Invite - Including Tax Planning
Tax Registration Notices	Registration Advice - ABN Registration Advice - ABN and GST and PAYG and TFN Registration Advice - ABN Cancellation Registration Advice - GST Cancellation Registration Advice - PAYG 0% Rate Registration Advice - PAYG Cancellation Registration Advice - PAYG New Amount Registration Advice - PAYG New Rate Registration Advice - PAYG Withdrawal by ATO Registration Advice - Start Paying PAYG Registration Advice - TFN FS - Year End Questionnaire Cover Letter FS - Year End Pack Cover Letter Employees Overtime Meal Allowance Letter SMSF - Year End Report Cover Letter ITR - Refund Tax Return to Sign ITR - Payable Tax Return to Sign FS - Year End Info Request (no questionnaire) FS - Year End Info Request (after job started) SMSF - Year End Questionnaire Cover Letter SMSF - Terms of Engagement Cover Letter EOFY Tax Tips and Reminders Annual Summary Report Cover Letter
Trust Distributions	Trust Distribution Resolution - New Client Alert Trust Distribution Resolution - Existing Client Alert Trust Distribution Resolution - Enclosed for Signing Trust Distribution Resolution - Not Required
Value Plan Price (VPP) Method	VPP - Method Email (Master) VPP - Business Structure Advice Recommendation VPP - Tax Forecasting & Tax Reduction Strategy Recommendation VPP - Offer No Risk Tax Strategy Meeting

Wealth Management	<ul style="list-style-type: none"> VPP - FBT Recommendation What is Freedom Planning Email Protected Shares Strategy Introduction SMSF Strategy Introduction Debt Loan Optimisation Strategy Introduction Wealth Builder Recommendation Letter MyProsperity Personal Wealth Portal Introduction MyProsperity Service Response Email Sophisticated Investor Certificate 6D Sophisticated Investor Certificate 7
Xero Engagement & Setups	<ul style="list-style-type: none"> Accounting Services Proposal Using Xero Using XERO as the platform for Fixed Price Agreements (FPAs) XERO - Introduce to Existing Clients XERO - Introduce to New Clients XERO - Initial Setup Info Request XERO - Initial Setup Complete