



## COMPLIMENTARY CLIENT REVIEW

Have you heard us say before how important it is to work on your business, not in it? It is essential to take time out to discuss what is happening in your business; not only so you have clarity about your future direction, but also so that we can ensure we are supporting you in the most appropriate way.

This meeting is an ideal opportunity for you to meet with us on a no charge / no obligation basis to discuss any of the following:

1. Your goals for your business and how you plan to achieve them.
2. How your business goals tie in with your personal and lifestyle goals.
3. Issues and challenges you are facing in your business e.g. growth, profitability, cashflow, asset protection, or your planned exit from or sale of your business.
4. How you can work with us to address these issues and plans.

### Who should have a review?

If you are keen to improve your business performance and financial results and minimise any risk in your investments then you should book this complimentary meeting. We firmly believe that we can help you more AND we want to do this!

By having a Complimentary Client Review meeting you have access to us to discuss and review your current situation at no cost to you. It is an opportunity for us to check in with you that we are giving you all of the

assistance that you need. For example, would you like to know more about our strategies to help you grow and protect your assets? Would you like help with improving your efficiency and effectiveness?

### What is involved?

You will have a free sixty minute consultation with a senior team member, reviewing your current situation, and discussing how we can support you in the most appropriate way. We will send you a copy of the meeting minutes and document all agreed actions.

If required we will also prepare a proposal for you including upfront prices of our services for any additional support work that we identified during the meeting.

### When should I get a review?

Our commitment to you is that we will meet with you at least once per year on a no charge basis. We have set aside time for this meeting to happen after your financial statements have been completed. Of course you don't have to wait until then; you can contact us any time to set up the meeting, or we will offer it to you once we have completed your annual accounts.



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### Benefits of Complimentary Client Review Meeting

- An opportunity for you to set and review your goals
- Gives you clarity about specifically what actions you need to take to achieve your goals
- Stimulates strategic discussion affecting the current and future direction of your business / investments
- Identifies your burning issues, opportunities and challenges so you can set actions to respond effectively
- Helps you understand your business better
- Giving you access to our collective wisdom
- You will receive an assessment on your current business structure
- It is an opportunity to identify greater tax efficiencies
- Identifies areas where we can assist you to further unlock your business potential through the growth and protection of your assets
- Gives you a better understanding of how our services can further support you.

### Are you ready to take the next step or would you like to know more?

Business name \_\_\_\_\_

Contact person \_\_\_\_\_

Email address \_\_\_\_\_

Phone numbers \_\_\_\_\_

- I would like to discuss this service further to gain a better understanding of what this involves
- I would like someone to contact me about other Business Development services that Malloch McClean offers
- I wish to engage Malloch McClean to provide a "Complimentary Client Review"

Please scan and email this side of the form to [events@mmca.co.nz](mailto:events@mmca.co.nz) or fax to **032144166**

You are welcome to drop this off at **101 Don Street, Invercargill** or Post to **PO Box 1402 Invercargill 9840**.

