

Digital YOUtax Week

Your YOUtax Journey

Your tax time journey with us is designed to master convenience with modern-day tech whilst allowing quality time with our professional accountants.

Following this process will make tax time less taxing.



YOU ARE HERE

So you have just booked in for Digital YOUtax Week with Emma or Vicki. Fantastic! Here are some other steps to take to be prepared for our tax chat meeting.

Are you a new YOUtaxer?

If this is your 1st Digital YOUtax Week, Welcome! We need you to ensure you are signed up before our meeting. [HERE](#)

Accept your Letter of Engagement Proposal

The Compliance Stuff - Our team will send you a Letter of Engagement detailing your Tax Service, Fees & Terms and conditions. You must accept your LOE proposal prior to your advisory meeting.

Upfront Fees

You will receive a separate invoice with payment details via email after this proposal has been accepted. Your upfront fees can be paid prior to attending your Tax Chat meeting.

Upload your tax information with 'Collaborate'

Please upload any receipts, documents or worksheets to Collaborate. **Collaborate** is a secure data sharing folder, linked directly to your tax account with YOUtax.

- After acceptance of your engagement your collaborate access will be emailed to you.

Awesome! Lets Meet

Understanding our Fee Structure

Your Letter of Engagement will detail your payment structure

UPFRONT PAYMENTS

All Basic Individual Fees with minor add-on services will be charged upfront with acceptance of your Letter of Engagement.

Additional Out-of-scope services will be charged after your tax chat meeting with your YOUtax Adviser

50% UPFRONT PAYMENTS

Individual Tax Returns with Add-ons incl Rental Properties and Business Schedules will be charged;

- 50% fee payment upfront, and
- 50% balance on completion of the return.

Please note tax returns will not be lodged until full payment has been received.

DEPOSITS OR MONTHLY PAYMENTS

Packaged Annual Services e.g. Mable Tax Benefits Program will be charge with a upfront \$100 deosit.

Any Annual Compliance services will be charge under your monthly payment plan.

Please Reach out to our friendly YOUtax team with your questions

Email: hello@youtax.com.au
Phone: 07 5301 9217
Web: youtax.com.au



- New YOUtaxer - [Sign Up HERE](#)
- Accept Letter of Engagement
- Check for Invoice
- Provide any receipts or tax info
- Let's Talk Tax

Your Senior Accountants



Emma



Vicki

WORKING FROM HOME RULES HAVE CHANGED

[DOWNLOAD YOUR FREE COMPLIANCE GUIDE](#)

