



Medical Packages

	Graduate Package	Professional Package	Independence Package
Preparation and lodgement of your taxation return for year ending 30 June 2018	✓	✓	✓
Annual review meeting and financial health check up, including discussions on: <ul style="list-style-type: none"> • Tax planning • Risk review • Education on financial planning • Tax office management • Tax deductions 	✓	✓	✓
Access to knowledge of our Grimsey professionals for up to 4 hours this includes time spent on: <ul style="list-style-type: none"> • Review meeting • Health check • Preparation and lodgement of tax • Independence package not limited to 4 hours 	✓	✓	✓
General Salary Packaging advice	✓	✓	✓
General financial planning advice	✓	✓	✓
Finance advice and implementation for loans and access to banking and finance strategy	✓	✓	✓
Access to property research reports and detailed cash flows for any property purchase (providing pre-approval with Grimsey is in place)	✓	✓	✓
Invitations to attend educational seminars on investment in property and share portfolios	✓	✓	✓
Risk advice and execution	✓	✓	✓
Access to the new Grimsey Wealth portal	✓	✓	✓
Review of Business Activity Statements pre-lodgement			✓
Preparation and lodgement of Business Activity Statements, along with book keeping services to assist with this process			✓
Personalised client quarterly cash flow and profitability reports			✓
	\$440 annually	\$770 annually	Priced on application