



# State of Play



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## Client Onboarding Experience

The State of Play is the first step to inviting UBTA with you on your journey to financial prosperity, or to manage and continue your existing success.

The purpose is to fast-track the depth of relationship between UBTA and your business for an accurate assessment of long-term compatibility, and alignment of objectives moving forward, designed to facilitate a seamless transfer from your previous accountant to us.

Included in the State of Play:

- Review of your financial reports and other business information
- Analysis report
- Site visit to your business premises (travel permitting)
- Detailed written report of findings and recommendations
- Follow-up conferencing call



## Business issues covered in the State of Play Review:

### Financial Health & Reporting

- Review of Financial Reports and other business information.
- Does the financial reporting meet the needs of the business?
- Financial Health Check to assess current state

### Tax Structuring Review

- Is the current structure efficient?
- Could there be any improvements?

### Business Plans and Outlook

- Where are your aspirations?
- How well are we prepared for the future?
- Opportunity to raise any other questions or issues.

### Follow-up care

- Detailed written report of findings and recommendations
- Follow-up conference call



UBT Accountants Australia  
T 1300 567 819  
clientsupport@udublaccountants.com  
[www.ubtaccountants.com](http://www.ubtaccountants.com)  
10 Herb Elliott Ave  
Sydney Olympic park  
NSW 2127

**Head Office Sydney**  
Level 6, 10 Herb Elliott Ave  
Sydney Olympic Park, NSW 2127  
T +61 1300 567 819  
[www.ubtaccountants.com](http://www.ubtaccountants.com)

**Melbourne**  
Suite 47, Level 32 Brandon Park Drive  
Wheelers Hill, VIC 3150  
T +61 1300 567 819  
[www.ubtaccountants.com](http://www.ubtaccountants.com)

**Perth**  
12 Baile Road  
Canning Vale, WA 6155  
T +61 1300 567 819  
[www.ubtaccountants.com](http://www.ubtaccountants.com)