

CLIENT HANDBOOK

Tax done differently.





WELCOME

Thanks so much for your interest in our business.

We are a boutique Australian online firm with with clients from all around Australia. We work remotely via email, phone and zoom in order to deliver tax returns, advice, accounting assistance, bookkeeping & virtual CFO assistance, and general business advice.

"Tax Done Differently", we are committed to making your life easy when it comes to keeping on top of your personal and business income tax and bookkeeping.

In order to ensure that we consistently provide our signature high-quality service, during busier times of the year, we don't always have the capacity to take on new clients.

Please feel free to <u>submit an enquiry</u> for more information.

FRESHWATER TAX PROCESS

Straightforward tax assistance.

Lodge your tax return quickly, easily, and thoroughly with our team of friendly, experienced Australian tax experts. All of our team are qualified CA or CPA accountants with many years of experience.









STEP 1

STEP 2

STEP 3

STEP 4

SUBMIT REQUEST

Send your tax or activity statement request through to our team via either our secure online portal or our editable PDF form upload link. (Whichever method you prefer!)

MEET & GREET

Your request will be confirmed and you'll be introduced to the team member who will be assisting on your task. We will be in touch with queries and points of note.

TAX PREPARATION

Once we have ironed out all queries, your tax return will be prepared. Our aim is always to have you in the best possible tax outcome for your unique situation with consideration of all key factors relevant to you.

TAX RETURN LODGED

Once we have prepared your tax return, you'll receive a copy by email for review & signature. Provided that you approve the return, it will then be lodged directly with the ATO on your behalf.

We redefine your tax
experience with innovation,
transparency, and a personal
touch—making tax time
easier, smarter, and stressfree.

Sarah Clayton, CEO - Freshwater Taxation





COMMUNICATION

The primary way that we communicate with our clients is via our firm-wide portal, Tax Dome.

Here we can chat about your situation, categorise chats by topics and securely share information.

Most importantly though, members of our firm will automatically receive TAX & BAS reminders annually with the appropriate form sent straight to your inbox.

Never worry about missing a due date again!

New Client: Frequently Asked Questions

The road to success is always under construction. Embrace the challenges, pave the way, and build your dreams one brick at a time.

Sarah Clayton, CEO - Freshwater Taxation