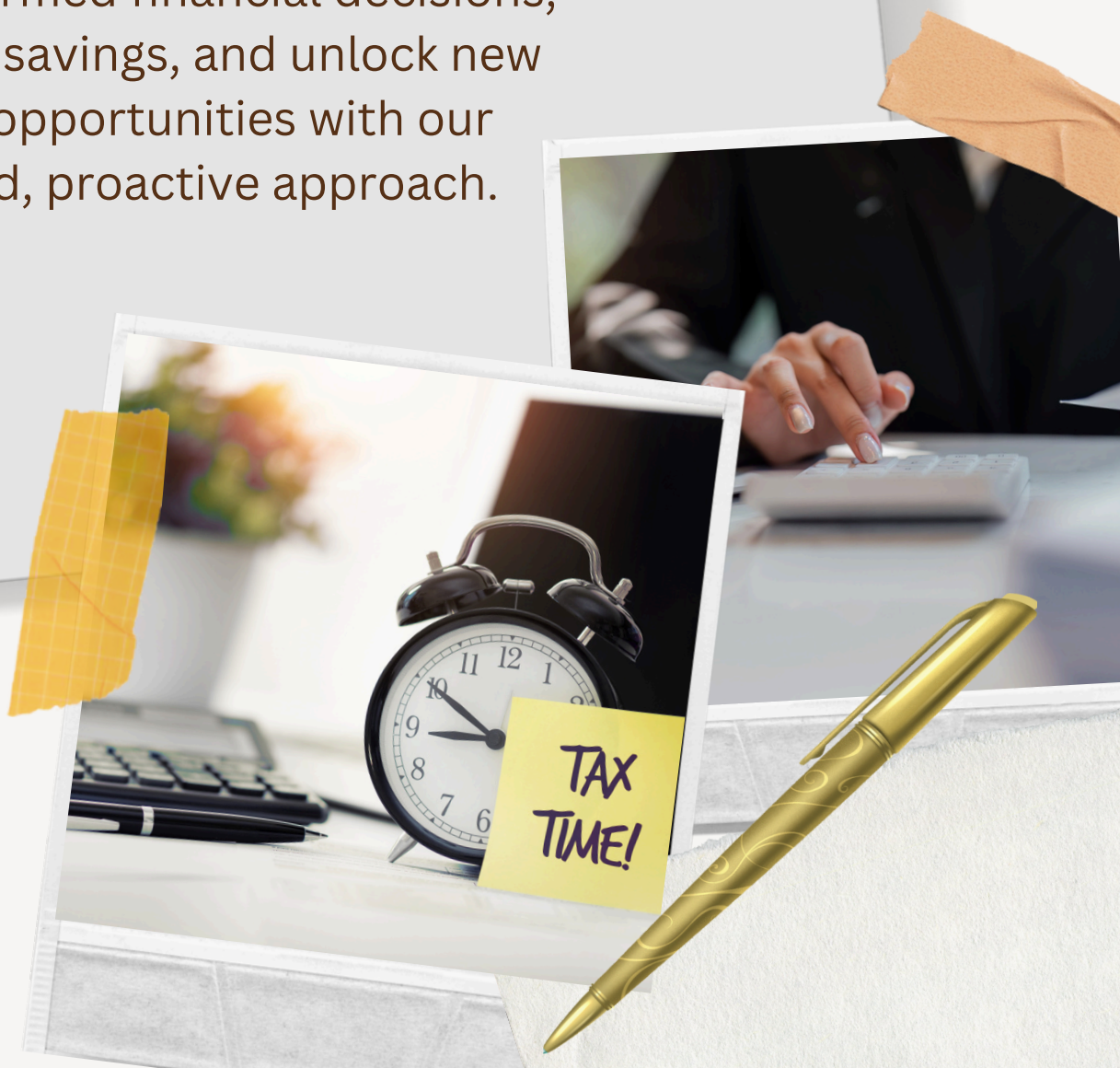




# 2025 TAX & EOFY PLANNING

**Take Control of Your Business Future with Smart Tax & EOFY Planning!**

Make informed financial decisions, maximise savings, and unlock new business opportunities with our structured, proactive approach.





# A comprehensive financial review

provides a detailed understanding of your business's financial health, enabling you to identify cost-saving opportunities, understand the key drivers of your success, and develop strategies for a more profitable future.





A white ceramic mug filled with a light brown coffee, topped with a layer of foam and small dark specks. The mug is placed on a light-colored wooden surface. To the right of the mug, a portion of a black notebook is visible, showing a page titled 'Goal Detail' with various form fields and checkboxes.

# PROACTIVE PLANNING FOR BUSINESS SUCCESS

Effective tax and end of financial year (EOFY) planning are essential for every business, regardless of financial standing. For profitable enterprises, strategic planning facilitates legal tax minimisation and strengthens financial foundations. For businesses facing challenges, it offers opportunities to enhance cash flow and stabilise finances.

At **DJ Grigg Financial**, we distinguish ourselves through our commitment to year-round planning. This approach ensures that your business remains financially resilient throughout the year, eliminating last-minute scrambles and reactive solutions. By taking the time to understand your specific business needs, we develop tailored plans that align with your goals.

Consider us your continuous financial partners, not just annual tax advisors. Our team delves beyond the numbers to provide insights that help your business thrive.

Let's discuss how proactive planning can position your business for sustained success.

# THE BENEFITS OF TAX / EOFY PLANNING

## 01

No More  
Surprises

***Know Exactly Where  
Your Business  
Stands Before  
30 June***

Proactive tax planning provides a clear picture of your financial position ahead of the EOFY, allowing you to anticipate tax liabilities and avoid unexpected expenses.

## 02

Smarter Business  
Decisions

***Leverage Your  
Numbers for  
Strategic Growth***

Regular financial reviews enable you to analyse performance metrics, identify growth opportunities, and make informed decisions that drive profitability.

## 03

Stay Ahead of Tax  
Changes

***Ensure Compliance  
and Take Advantage  
of New Incentives***

Keeping abreast of evolving tax laws allows you to remain compliant and capitalise on new deductions, credits, or incentives that benefit your business.

## 04

Secure Your  
Financial Future

***Use Tax-Effective  
Strategies to  
Strengthen Cash  
Flow and Business  
Resilience***

Begin tax planning early, starting in April, so you have the time to implement strategies that make a real difference for your business and its long-term goals.

## 05

Optimise Your  
Tax Position

***Legally Minimise  
Liabilities and  
Maximise  
Profitability***

Strategic tax planning identifies legitimate deductions and credits, reducing tax liabilities and increasing after-tax income.

## 06

Enhance Financial  
Predictability

***Plan for Future  
Obligations with  
Confidence***

By forecasting tax obligations, you can manage cash reserves effectively, ensuring you're prepared for future financial commitments without disrupting operations.



# THE TAX PLANNING PROCESS EXPLAINED



## **1 In Depth Analysis**

We start by analysing your accounting file to determine your Year to Date (YTD) result. Then, we project your result to 30 June 2025, using your business trading history, trends and forecasts, giving you the clarity needed for your EOFY strategy.

## **2 Taxable Income and Tax Estimation**

We'll calculate your expected 2025 taxable income, helping you plan ahead. We'll also calculate your estimated tax payable, as well as your 2026 tax instalment, so you know exactly what's coming and when.

## **3 Tax / EOFY Strategy Planning**

We'll identify all available tax and EOFY planning opportunities to improve your 2025 financial position, tailoring our approach to your specific circumstances.

## **4 Tax / EOFY Planning Meeting**

During our meeting, we'll work together to finalise your strategy. We'll review the options and answer your questions. We'll also help you identify and address other business opportunities and challenges, with further support available for complex issues.

## **5 Tax / EOFY Planning Report and Beyond**

You'll receive your completed Tax / EOFY Planning Report and action plan shortly after our meeting.



# WHAT YOU NEED TO DO

## 1

SUBMIT



### REGISTER YOUR INTEREST

Register interest for your tax/EOFY planning review by completing a short form linked [here](#). Spaces fill up fast, so don't miss out!

## 2

### COMPLETE YOUR PROPOSAL & QUESTIONNAIRE

Set aside time to read and submit your service proposal and then fill out your questionnaire and return it to us as soon as possible. This ensures we can tailor your tax/EOFY planning review to your unique circumstances and provide the most relevant recommendations.



## 3

### UPDATE YOUR ACCOUNTING FILE

Ensure your MYOB, QuickBooks, or Xero file is fully reconciled up to the review period. This gives us the most accurate financial snapshot to work from.



## 4

### ATTEND YOUR PLANNING SESSION

We look forward to meeting with you - either in person or via Zoom - to go through your results, estimated tax, and our recommended tax saving and business growth strategies.



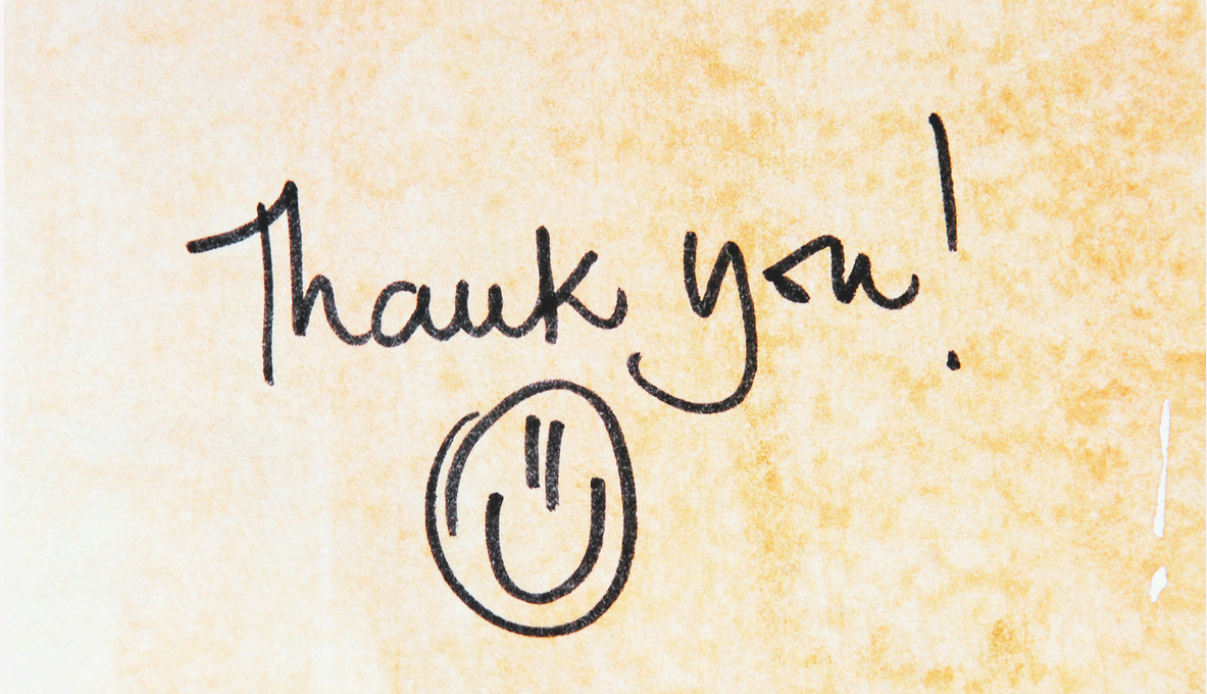
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**Your success  
is our priority.**

**We'll help you  
thrive, not just  
survive.**







We appreciate your time and interest in working with us.

Please register your interest by clicking [here](#) and complete the ensuing engagement proposal and questionnaire at your earliest convenience to secure your place in our tax planning process. We're excited to embark on this collaborative journey towards your success.

*Tony Mechan*

**DJ Grigg Financial**

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