

1 April 2022

The Clareville Bakery Limited  
106 Carters Line  
RD2  
Carterton, 5792

Dear Michael & Rosalie,

### **Our packages**

The package that you are on is suited to you and your business, as well as your own individual needs.

Therefore, we are delighted to confirm that you are on the Medium business accelerator plan at a monthly cost of \$199 per month.

Your personalised package includes:

- Xero fees from 1 April 2022 to 31 March 2023 (the standard subscription)
- The 2023 Annual Financial Statements and associated Tax Returns
- Phone and Email correspondence throughout the year

Your package does not include:

- GST Returns
- PAYE Returns/Payroll
- Management Meetings
- Budgeting/Forecasting

If your package changes throughout the year and requires adjustment, we will revise and advise you of your new payment. This includes a change to your Xero package which is included in our fees.

To be effective, we believe that professional relationships need to be based on mutual trust, mutual support, mutual respect, and mutual integrity.

As a result, we only work with clients who share our belief in the importance of these four factors.

### **Our Commitment to You**

We will do everything in our power to:

- Maintain the high standards of integrity, honesty, openness, professionalism, and confidentiality that you rightly expect from us
- Deliver friendly, courteous, and outstanding service. You will be respected and not taken for granted
- Meet the deadlines we set with you. We will keep you fully informed about what's happening on your affairs, and complete every task on or ahead of time, so that you never have to chase us

- Operate on the principle that a problem isn't solved, or a piece of work finished, until you are 100% delighted. We totally believe that your perception of our performance is always the reality. For that, and other reasons, your feedback is critical to our continuing to innovate and improve
- Refer our contacts to you where we believe they could benefit from your products and services
- Our prices will rarely, if ever, be the cheapest on the market. Our services will be of exceptional quality and designed to add significantly to your net financial worth
- The way we communicate with each other is important to you (and therefore to us). As part of that process, we will acknowledge any communication you have with us before the end of the next working day. Telephone calls will be returned same day
- Our people have the authority to make decisions without necessarily referring those issues to a Partner of this firm
- We are not just bean counters. We are truly experienced in business improvement matters. Not only have we built a successful business from scratch, but we have also witnessed the numerous successes and sometimes failures of the businesses we serve. We are totally committed to sharing that experience with you. We expect you to communicate with us frequently too

#### **Your Commitment to Us**

You will do everything in your power to:

- Maintain the high standards of integrity, honesty, and openness that we rightly expect from each other
- Tell us immediately if we do anything that you are in any way unhappy with
- Provide us with any information and answers we need and access to your team to carry out our work within the mutually agreed timeframes
- Listen to any advice we offer. We acknowledge your absolute right to reject it
- You will attend to our account on the terms we agree upon
- Refer three contacts to us where you believe they could benefit from our help

Kind regards



Melanie Edwards CA (PP)  
 Director  
**Innovative Advisory**  
 Chartered Accountants