

# TAX STORE

SIMPLE SMART SOLUTIONS

OUR MANAGEMENT CREDENTIALS



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# OUR TEAM



**JOSE ALGUERA-LARA**

B.Bus(Acc), CTA, FIPA, AICPA,  
FCMA, CGMA, FFA, AFF. CA, D.FP  
Founder & Director



**NURUDEEN ABBAS**

BSc, MTax, FTI, CA, ACCA, SSA  
Founder & Director



**MARILYN ALEXANDER**

Audit Partner



**ROSS WADESON**

Partner



**GIOVANNI TAM**

Operations Manager



**PRENITA BOATWOOD**

Office Manager



**JO JOHNSON**

Marketing and Communications  
Manager



**DIANA ABELLO**

Talent Acquisition Consultant



**JACE SIMON**

Assistant Marketing

## OUR HISTORY



OUR MID-TIER-PROTOTYPE OF  
TAX STORE



ONE STOP SHOP MODEL



SPECIALISED IN BOOKKEEPING &  
BAS LODGEMENT



AFSL 446176



RTO No. 21476





# BENEFITS OF JOINING TAX STORE



CA Firm



Business Advisory Driven – Future of Accounting



Centralised Systems



Proven Business model



Corporate Branding



Comprehensive One-Stop Shop



Client-Centric Approach



Succession Planning Assistance



Daily Support, Monday-Friday



Back Office Support



Multiple of income streams from additional services



Flat royalty

## SERVICES OUR PARTNERS OFFER

### BUSINESSES

- ☐ Accounting and financial reporting
- ☐ Tax compliance
- ☐ Bookkeeping
- ☐ CFO Services
- ☐ Self-managed super funds
- ☐ Auditing
- ☐ Business Succession Planning
- ☐ Business Advice

### INDIVIDUALS

- ☐ Tax returns
- ☐ Insurances
- ☐ Financial planning
- ☐ Mortgage broking
- ☐ Superannuation
- ☐ Self-managed super funds

# True Collaboration

Shared values. Shared services. Shared success.

We know how hard you've worked to build and grow your business. We understand the sacrifices you've made to deliver quality work to your clients and create a supportive, enjoyable workplace for your employees.

We know that

when you started an accounting practice you didn't realise you were signing up to be a marketer, an IT support technician and a salesperson too! How? Because we've all been there done that. It's uncomfortable and challenging and possibly hasn't delivered you the success you foresaw.

We now know there's a better way.

Whether you're almost ready for retirement and looking for a succession plan, or you still have time to turn things around to make your business more viable, everyone can benefit from a supportive and experienced partner.

Tax Store is that partner.



## WHAT MATTERS TO US (DOES IT MATTER TO YOU?)

We are specific about who we partner with for very good reason: like-minded professionals with similar vision are more inclined to integrate, support, refer and succeed together. So, if you are a baby boomer accountant looking for an exit strategy or are ready to partner with a network of professionals who can grow your current accounting practice, and you're interested in true collaboration, we'd love to hear from you.

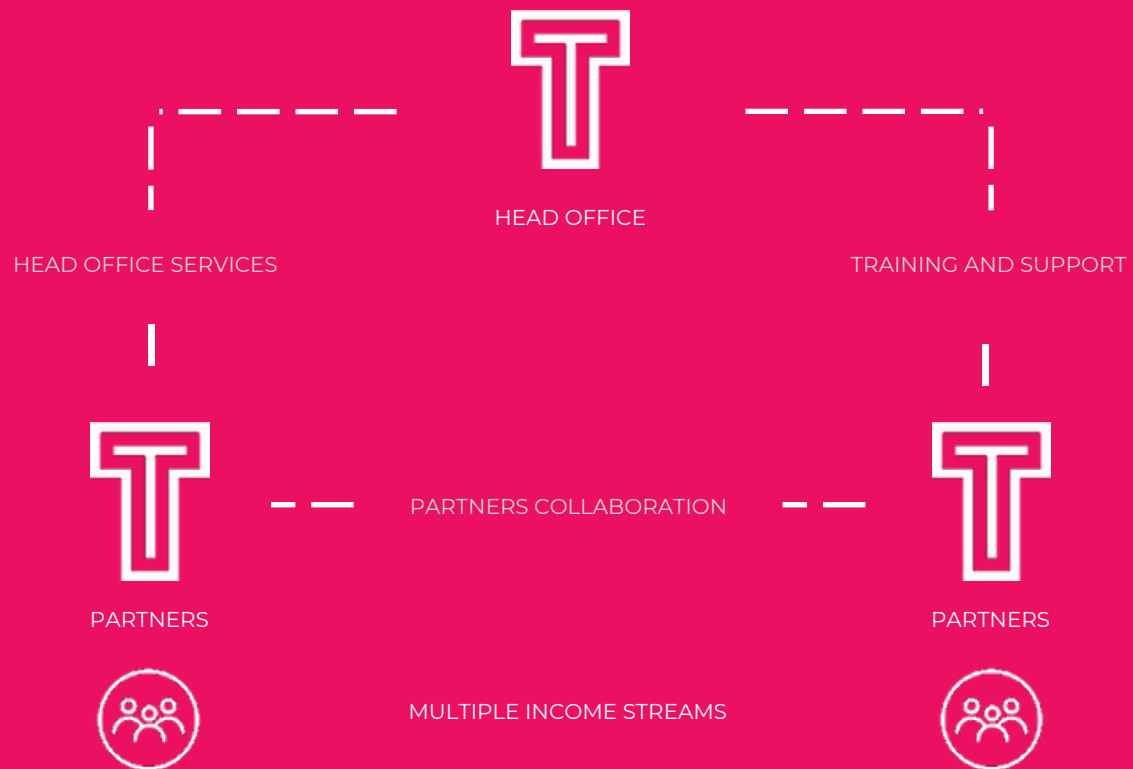
### The partner qualities we seek:

- ☐ Lifelong learners
- ☐ Exceptional work ethic
- ☐ Ability to think outside the box
- ☐ Unafraid to disrupt the status quo
- ☐ Relationship driven
- ☐ Operate with absolute integrity
- ☐ Motivated, passionate and ambitious
- ☐ Inclusive with a belief there is a place for everyone
- ☐ Community-oriented

# WHAT MAKES US UNIQUE?

OTHERS		TAX STORE
INITIAL INVESTMENT	\$10,000 - \$20,000 +	Let's discuss the best option for you
ROYALTY FEE	GST 15% - 30% if not registered tax agent	The greater of: 11% of the weekly Gross Revenue plus GST; or \$900 per month plus GST
LODGMET OF PERSONAL INCOME TAX RETURNS	N/A	\$2.50 ea
LODGMET OF BUSINESS ACTIVITY STATEMENT	N/A	\$2.50 ea
ESTIMATE LODGMET OF COMPANY AND TRUST RETURNS	N/A	Between \$20.00 to \$200.00 ea
TECHNOLOGY FEE	N/A	\$2500 + GST (*All prices are subject to change based on Sage and Microsoft
ACCOUNTING BODY	N/	Chartered Accountants
ADDITIONAL INCOME STREAMS	A N/	Yes - financial planning and mortgage broking
CLOUD-BASED PLATFORM	A N/A	Yes - it allows you to access from anywhere
PAPERLESS ACCOUNTING FIRM	N/A	Yes
START-UP TRAINING + ONGOING SUPPORT & TECHNICAL TRAINING	Yes - some offered only 3 days basic training	Yes – 3 months + one week training in head office, hands on job + lifetime mentoring / support
INDIVIDUAL TAX RETURN DRIVEN	N/A	Business services oriented
BUSINESS COACHING	N/A - Is it free to	Yes – it is free to our partners
MARKETING SUPPORT	franchisees? Yes	Yes – ongoing marketing support. Google AdWords, SEO, digital marketing, social media marketing and more...
FRANCHISE AGREEMENT	10 – 20	5 x 5
PROVIDE ACCOUNTING SOFTWARE	years Yes	Yes – Sage Handisoft, biggest accounting software in the world

# THE TAX STORE MODEL



We have been partnering with accounting professionals using our True Collaboration model since 2013, right across Australia. We have now helped more than 15 Partners to create thriving businesses through efficient systems and processes, better people management, and access to a flourishing network of professional services for their clients. Together we succeed.

## WHAT OUR TRUE COLLABORATION MODEL OFFERS:

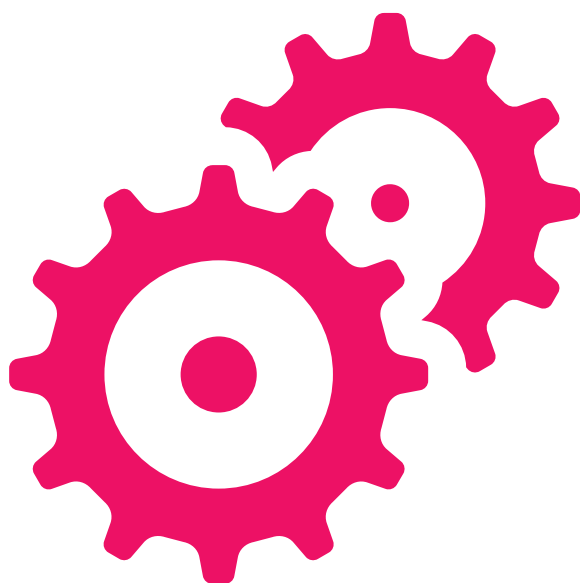


### STRATEGIC SUPPORT AND SUCCESSION PLANNING

We invest in you to drive the best outcomes for your business, now and into the future. The coaching and support received through our True Collaboration model is second to none. Our decades of commercial, consultative and financial experience have repeatedly proven to truly transform accounting businesses. You'll see marked improvements in your client experience, employee satisfaction, revenue growth and expense reduction.

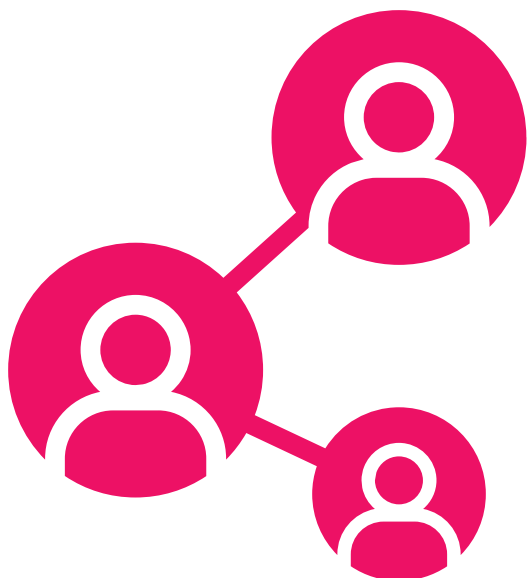
### CENTRALISED SERVICES

Back-office functions such as technology, marketing, people management and administration are often the most expensive and laborious to set up – and they distract you from what you know and love doing. When you become a Tax Store partner you immediately tap into our proven systems and processes and back office support to take that pain away.



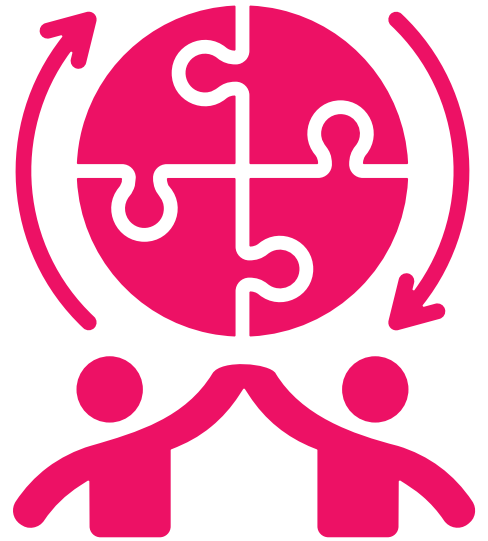
### PROFESSIONAL NETWORK

Both individuals and businesses are increasingly looking for one-point access to professional services –lawyers, business advisors, accountants, financial advisors. As a Tax Store partner, you can leverage the skillset and experience of our professional network to offer clients a fully integrated financial service.



## CULTURE

The way we do business provides certainty and confidence, for our clients, our employees and Partners. We are an inclusive community who bring out the best in each other, supporting and celebrating diversity whilst working to similar goals. We appreciate balance in life but enjoy hard work. We encourage curiosity and continuous education so that we can continue to succeed personally, professionally and for our communities.



## ADDITIONAL INCOME STREAMS

STRATEGIC  
ALLIANCES

FINANCIAL  
PLANNING

SMSF  
LENDING

ASSET  
EQUIPMENT  
FINANCE

INSURANCE

RESIDENTIAL  
LOANS

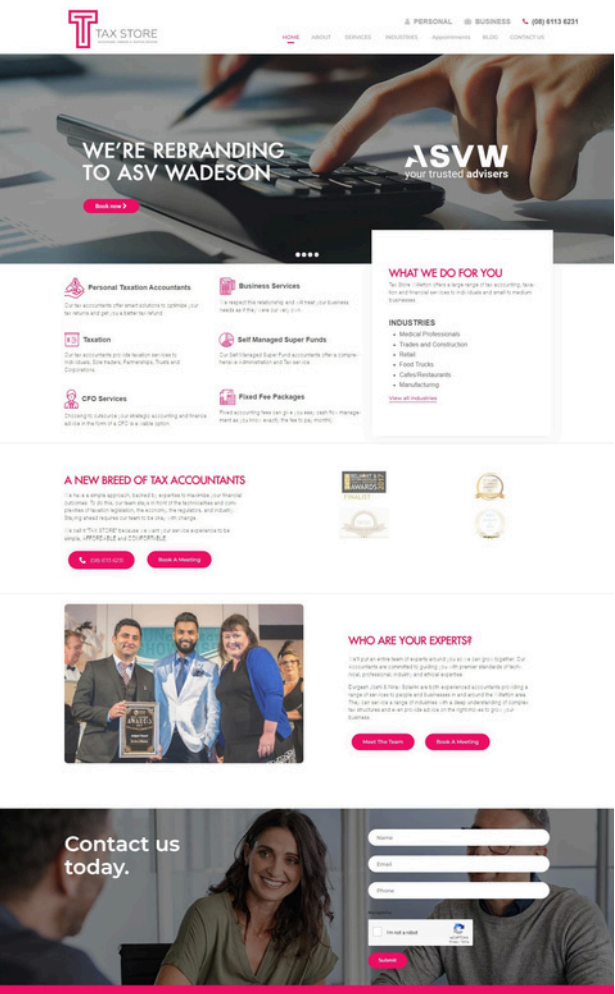
BUSINESS  
LOANS

COMMERCIAL  
LOANS

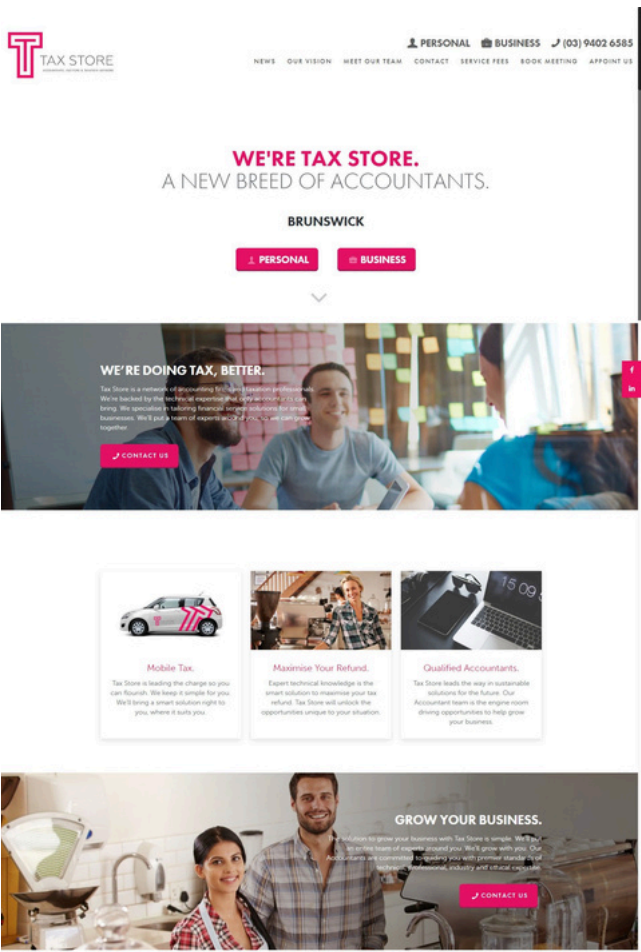


# WEBSITES FROM OUR PARTNERS:

## Tax Store Willetton



## Tax Store Brunswick





# WIN A CAR PROMO

Get a chance to win a **Brand New MG3 Auto** on our **October 31, 2023** draw!

Go to your nearest Tax Store and have your tax done from **1st November 2022 to 30th October 2023** to earn an entry to this promo.



TAX STORE  
ACCOUNTANTS, ADVISORS & TRUSTEES AUSTRALIA



1300 367 594



## MARKETING SUPPORT

- ☐ Digital marketing
- ☐ Google ad words
- ☐ Landing page with office locator
- ☐ Access to in-house templates, systems
- ☐ One to one guidance and business development
- ☐ Proven marketing plan - to execute

## MARKETING STRATEGY

- ☐ Organic Growth (12 - 24 months)
- ☐ National and local level
- ☐ Get a feel of the industry
- ☐ Make all minor mistakes
- ☐ Develop advisory skills
- ☐ To be able to execute our second stage marketing strategy (M&A - Mergers & Acquisition) using banks money to pay.

# SAMPLE LEADS

☐ On behalf of ... <[admin@taxstore.com.au](mailto:admin@taxstore.com.au)>

NAME: Rupert

EMAIL: ...

PHONE: ...

Postcode:

Office:

Referral: Shopping Centre

My wife and I are looking to do our tax returns. We've sold an investment property last year and I've got a small share portfolio. Do you have availability for the last weekend of September or the first weekend of October? Is there anything that we need to bring to the appointment?

☐ On behalf of ... <[admin@taxstore.com.au](mailto:admin@taxstore.com.au)>

NAME: Nicole

EMAIL: ...

PHONE: ...

Postcode:

Office:

Referral: A Friend

Hi, I'd like to make an appointment to have my tax done.

Regards Nicole

☐ On behalf of ... <[admin@taxstore.com.au](mailto:admin@taxstore.com.au)>

NAME: Sheree

EMAIL: ...

PHONE: ...

Postcode: 0812

Office: Darwin

Referral: Search Engine (Google, Bing, etc)

Hi there, I would to book in with someone to do my tax return as it is a little complicated for me this year as I had a termination payment (annual leave payout).

I see you have great reviews online.

I am available most Mondays.

Thank you

Sheree Taiawa

Please Note: We do not guarantee income or clients.

# SAMPLE LEADS

## ☐ On behalf of ... <[admin@taxstore.com.au](mailto:admin@taxstore.com.au)>

NAME: Samantha

EMAIL: ...

PHONE: ...

Postcode: 3056

Office: Brunswick

Referral: Search Engine (Google, Bing, etc)

Hi Vu ... I have a relatively straight forward individual return to lodge for 22/23 (which I would normally do myself). But, I sold an investment property and need to lodge an application for CGT exemption under the six-year rule. I'd hate to get this wrong! Can you help? Many thanks, Sam

## ☐ On behalf of ... <[admin@taxstore.com.au](mailto:admin@taxstore.com.au)>

NAME: Azmul

EMAIL: ...

PHONE: ...

Postcode: 0812

Office: Leanyer

Referral: Search Engine (Google, Bing, etc)

I wanted some CA who can manage my personal and business tax and bookkeeping.

## ☐ On behalf of ... <[admin@taxstore.com.au](mailto:admin@taxstore.com.au)>

NAME: Rouana

EMAIL: ...

PHONE: ...

Postcode:

Office:

Referral: a Friend

Hello,

I'd like to enquire about getting some tax help. I'd like help completing my tax for the last three years so that I don't miss anything that I can claim.

For one of those years I was running my own business, but otherwise just studying and working casually/part-time. I would love to understand what it would look like working with you- what your rates are and what I would need to provide you with. E.g financial statements for the whole period, or not necessary?

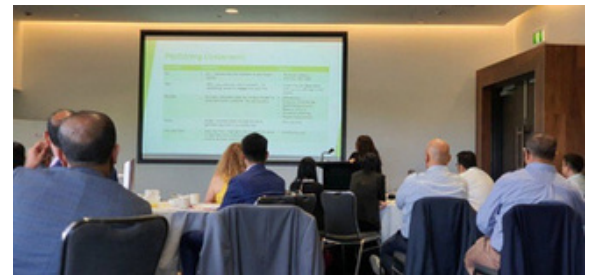
Thanks! Rouana.

Please Note: We do not guarantee income or clients.



# EVENTS: PAST, PRESENT & FUTURE

Tax Store Development Day at Tweed Heads, QLD  
Monthly webinars, info session & various networking events  
Sydney Franchising Expo



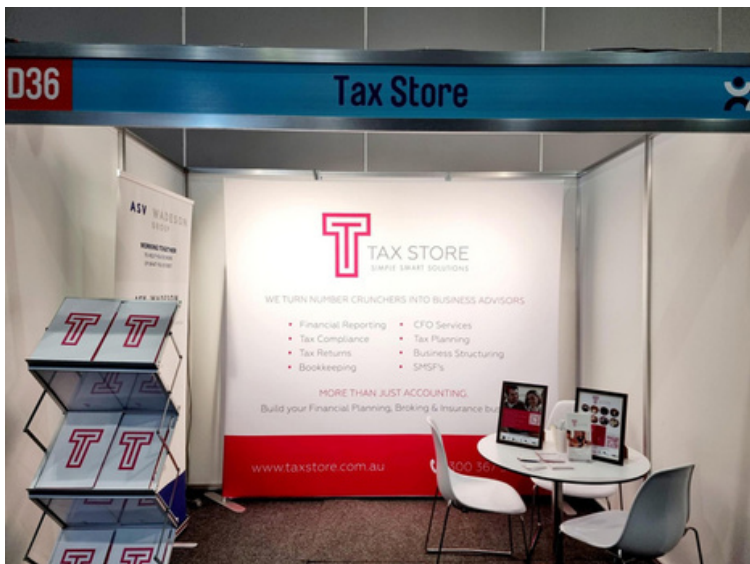
## Tax Store Annual Conference - Sydney





# EVENTS: PAST, PRESENT & FUTURE

Melbourne, Sydney, Perth, and Brisbane Expo



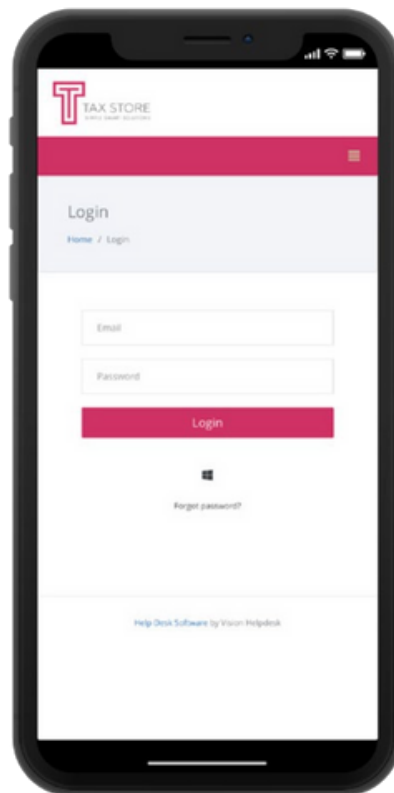
## TAX STORE PLATFORM

- Tax Store Private Cloud (Hosted Applications)
- Sage Handisoft and associated Modules
- Custom Build Solution Centre
- Microsoft Office 365
- Microsoft SharePoint Library

sage HandiSoft

SharePoint

Office 365



myob

## TAX STORE PARTNER TARGET MARKET

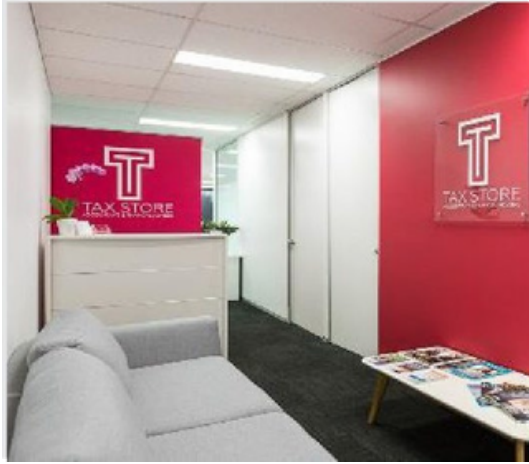
- Small to medium sized businesses



- Industries
- Family businesses
- Health care professionals
- Chi roprac t i c
- Real estate
- Hospitality
- Manufacturing
- Architecture/design
- T ec hnol ogy
- Construction
- And more...



# TAX STORE OFFICES AROUND AUSTRALIA



TAX STORE - SYDNEY



TAX STORE – MANOR LAKES



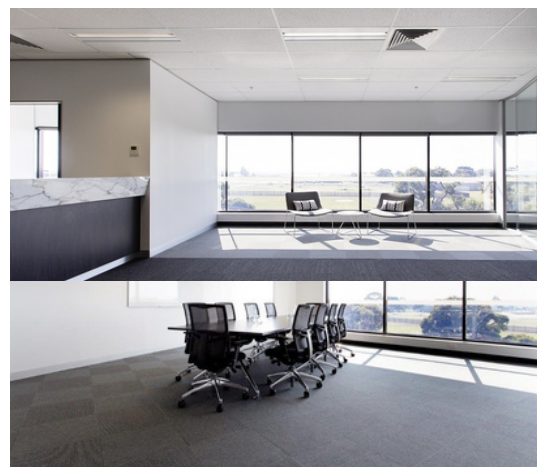
TAX STORE - MACKAY



TAX STORE - BRUNSWICK



TAX STORE - CAMBERWELL



TAX STORE - HEAD OFFICE

## SOME OF OUR PARTNERS



**MASUD RAHMAN**  
Tax Store North Adelaide



**ANJILA SHRESTHA**  
Tax Store Rockdale



**JAMES LE**  
Tax Store Springvale



**EVELEEN RAO**  
Tax Store Hobart



**NIRAV SOLANKI**  
Tax Store Willetton



**JENNIFER HICKEY**  
Tax Store Mackay



**WILLARD SILVERIO**  
Tax Store Gosford



**GYE DUNCAN**  
Tax Store Norfolk Island





**SUYANA SHRESTHA**  
Tax Store Darwin




## SAMPLE REVIEWS


Here are some reviews which our partners have received.


**Rajani Gurung**  
2 reviews

 8 months ago


It was my first time filing a tax return and as a international student, I had no clue on how to go about it. However a friend introduced me to Suyana. I have to admit that she is very competent and professional. I am very satisfied and pleased with her service. There was no hassle and no miscommunication as I am based in Sydney. I am definitely going to recommend her to all of my colleagues !!!




**Emily S**  
9 reviews

 6 months ago

Atif is thorough, patient and fast - he tells me everything I need to know up front and is the easiest person to work with. He has done my tax for the last 3 years and I'll never go anywhere else.



**Mountain Farmhouse**  
2 reviews

 a year ago

**Positive:** Professionalism, Quality, Responsiveness, Value

The best value in an accountant we have had since we started business in 1992. We found Eveleen through a recommendation and engaged her firm straight away. Our business is diverse and complex over several areas and not easy to understand. Eveleen understood our business structure straightaway and the reason behind it, which took the last accountant an hour for us to explain. Great to have confidence in an accountant who is so approachable. Highly recommend.




**Deborah Krishna**  
6 reviews


 9 months ago

Fantastic 😊


Tax store was recommended to me by a friend and I am so glad I did my tax with these agent. Never had so Much fun doing my taxes like I have had with Percy and Juliee. Absolutely amazing service, super friendly and calm. Didn't feel rushed and they made sure everything was done properly, double check all my claims and details to make sure I was happy with my refund. I can't thank them enough for being so helpful and provided such good service.



**Taj Singh**  
1 review

 6 days ago **NEW**

Always available, know what they are doing and is a one stop shop for all accounting needs of a my medical business. Highly recommended.



## SAMPLE REVIEWS

Here are some reviews which our partners have received.



**Moh Maitieg**

2 reviews · 1 photo



★★★★★ 3 years ago

Fantastic customer services. We run a family business and we have been with Durgesh about three year now which is a great experience. Very approachable accountant and helpful, every time we meet we learn something new. We reached to a level of running a business in a professional manner, as we came from a long way due to poor accountant that we dealt with prior Taxstore.in othe words, a hassle free at Tax store Willetton. Thanks



**Maurice Oteri**

1 review



★★★★★ 2 years ago

**Positive:** Professionalism, Responsiveness

As a commercial lawyer since 2008 and SME owner of 55+ different businesses since 1984, I believe I am qualified to say that I have come across my fair share of 'professionals' and 'service providers' in the Accounting space and this is the first time in over 35 years that I have the confidence to put my name on a positive review for my accountants Nirav Solanki and Durgesh Joshi here at Tax Store Willetton.

Their service and advice is just first class, and no task is too small for them, they look after all of my commercial and personal interests I wish I had met them a long time ago, keep up the great work boys.



**Genesys Ptrs**

★★★★★ 11 months ago



Excellent service. Price is affordable. I would recommend companies to get their accounting and tax done. Although they are strict with documentation but it is worthwhile.



**Shangitha Kistasamy**

★★★★★ a year ago



Yen has been doing my tax returns for the 5 years....She even helped me do my returns whilst I was abroad....Shes fast and efficient always has given us good service.....

## OUR LOCATIONS



## OUR RECRUITMENT PROCESS

### Phase A 1 - 2 Weeks



**01**

READ BASIC INFO PACK



**02**

COMPLETE  
QUESTIONNAIRES



**03**

DISCUSSION WITH  
FRANCHISOR



**04**

DUE DILIGENCE COMMENCE

### Phase B 2 - 3 Weeks



**05**

READ  
FRANCHISE  
AGREEMENTS



**06**

SHOW TAX STORE  
PLATFORMS /  
SOFTWARE



**07**

COMPLETE  
BUSINESS PLAN

### Phase C 3 - 6 Weeks



**08**

FRANCHISE  
AGREEMENT  
SIGNING



**09**

FINALISE PAYMENT



**10**

ATTEND 1 WEEK  
TRAINING PROGRAM



**11**

FRANCHISE  
AWARDED!  
3 MONTHS HANDS-  
ON TRAINING

# PURPOSE OF DUE DILIGENCE

## How does the due diligence process work?

- ❑ \$1200 + GST (\$1000 + GST is fully refundable, \$200 is for bankruptcy check, police checks, admin)
- ❑ Start on your business plan -
- ❑ Work on your marketing plan -
- ❑ Send you a draft Tax Store documents to read –Franchise Agreement, disclosure document
- ❑ We will show you a demo of our cloud-based platform and software -
- ❑ Send you a branding guideline and sample of how your office should look like -
- ❑ Price list guide
- ❑ Speak to our existing partners for feedback

The purpose of this due diligence process is to see if we like each other enough to work together, find out what your goals are, how can Tax Store help you get there and learn about the Tax Store systems.

We want you to have your business plan and marketing plan ready before commencing your own accounting firm. The due diligence process will take at least 3 - 8 weeks and should you wish not to proceed then we will refund your deposit of \$1000 + GST.

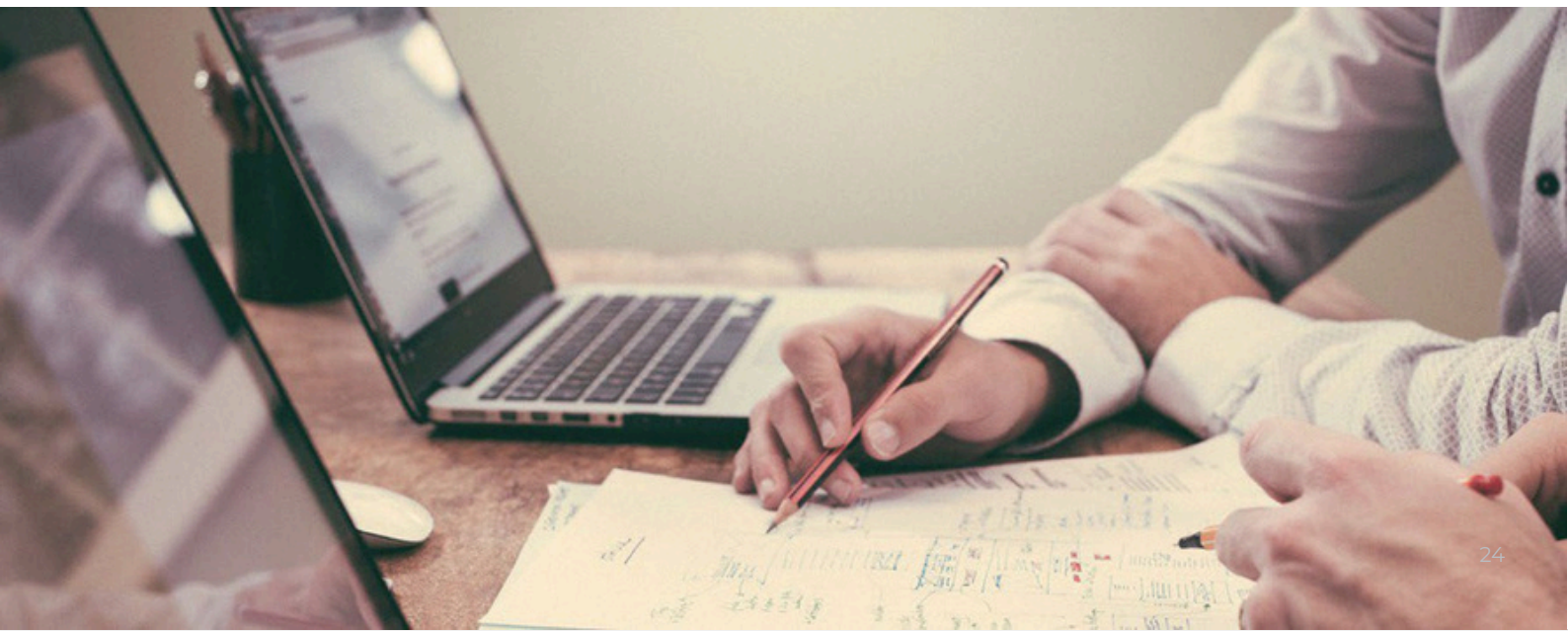
We will help and guide you through this exciting journey. You are in business for yourself but not by yourself.

We have a team that can support you, mentor you, train you and hold your hands until you are ready to let go.

We believe that your success is our success.

# FINANCING OPTIONS

- ❑ Bank Loans
- ❑ Equity Finance
- ❑ Family and Friends
- ❑ Speak to us







## FREQUENTLY ASKED QUESTIONS

### **DO YOU PROVIDE A BUSINESS PLAN?**

Yes, we will provide you with a business plan template.

### **HOW BIG IS THE ACCOUNTING INDUSTRY?**

The accounting industry is worth over \$20 billion.

### **DO I HAVE TO BE A CA, CPA OR REGISTERED TAX AGENT TO RUN MY OWN TAX STORE?**

No, that is one of the benefits of joining us.

### **DO YOU PROVIDE CASH FLOW PROJECTION THAT ANY OF YOUR FRANCHISEE USED FOR PLANNING AT THE START-UP PHASE?**

Yes, we will provide you with a cash flow projection template once you've made the deposit.

### **CAN TAX STORE HELP ME WITH MY TAX AGENT LICENCE?**

Yes, you still need to refer to Tax Practitioners Board.

### **HOW MUCH CAN I EARN IN THE FIRST YEAR?**

Unlimited potential of earning, based on how well you follow our system.

### **ANY GUARANTEE INCOME OR CLIENTS?**

We do not guarantee clients or income but what we can guarantee is a proven quality marketing plan and quality training that can help you grow and succeed in your business. Our training is systemised and proven to work. We believe in generating organic clients that will stick with you for the rest of your life.

### **I AM STILL LOOKING AT OTHER FRANCHISES?**

Fantastic! We have lots of respect for people who do their research and we do encourage people to look at our competitors because we are very confident once you looked at what they offer and what we offer, you will notice we have a superior offering in terms of training, business coaching, marketing, software, cloud-based server. You are also connected to a network of other franchisees.

### **HOW MANY VIEWS DO YOU RECEIVE ON YOUR WEBSITE?**

We receive over 10,000 views per month.

### **WHAT TYPE OF CLIENTS DO I TARGET?**

Small to medium sized businesses and individuals. There are over 3 million registered SME in Australia.

### **HOW DO YOU HELP THE FRANCHISEES ACHIEVE THEIR GOALS?**

We provide you with a proven business plan template to help you visualise what your firm will look like in 12 months, 2 years and 3 years from now. We also provide you with a coach that will help you grow your business. You will have access to unlimited coaching, mentoring and marketing support.

### **IS THE FRANCHISE FEE FLAT RATE?**

Yes, it is 11% flat rate base on your turnover. It will always be 11% whether you're a registered tax agent or not.

# TESTIMONIALS

What do our  
**TAX STORE**  
**PARTNERS** say?

“

**Masudur Rahman**

Tax Store North Adelaide

"I'm Masudur Rahman, a proud franchisee of Tax Store North Adelaide. The unparalleled support and resources provided by Tax Store Australia have been instrumental to my success. Their team is always available to answer my questions and offer innovative solutions, allowing me to differentiate myself from competitors. I highly recommend Tax Store Australia to anyone looking to start their own tax and accounting business."



”



**TAX STORE**  
ACCOUNTANTS, AUDITORS & TAXATION ADVISORS

What do our  
**TAX STORE**  
**PARTNERS** say?

“

**Yen Leong**

Tax Store Brisbane

"What I appreciate most about Tax Store Australia is their commitment to innovation. They are constantly developing new tools and services to help franchisees better serve their clients. As a result, I feel confident that I am offering the best possible solutions to my clients and that my business is positioned for long-term success."



”



**TAX STORE**  
ACCOUNTANTS, AUDITORS & TAXATION ADVISORS

# WHAT DO I DO NOW?

SO, YOU'RE CONVINCED THAT YOU HAVE WHAT IT TAKES?

You might be right! But remember before you get close to purchasing a franchise, it's really important you seek financial advice.

Once you're ready, we'd love you to contact us on the below and proceed to the next stage.

WHEN IS THE NEXT TRAINING INTAKE?

To find out more, speak to one of our consultants.

## GET IN TOUCH

First name\*

Last name

Email address\*

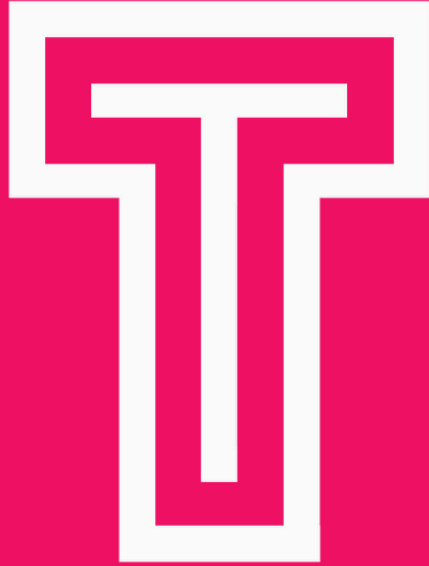
Phone number\*

Messages\*

**SUBMIT**

SCAN ME





TAX STORE  
SIMPLE SMART SOLUTIONS

[www.taxstore.com.au](http://www.taxstore.com.au)  
[www.taxstore.com.au](http://www.taxstore.com.au)