

Use technology to improve client communications

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Secure... Efficient... Convenient

**By now I am sure you all know
what a client portal is!**

**The question is why have they
become such a rage in the
accounting profession?**



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Communication
Security
Efficiency
Control
Knowledge
Image
Perception
Website
Marketing
Carbon reduction
Staff

CLIENT SELF - SERVICE

We are knee deep into the area of **self-service access** to electronic information....

As we accountants are responsible for some of the most **critical** and **confidential** information that our clients rely on....

Can we afford to ignore the growing trend towards using portals to give clients control and options to access information on their own initiative at anytime, from anywhere....



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INCREASING THE VALUE OF YOUR FIRM

Deploying an effective portal solution for your clients will have a **direct** and **positive** impact on the **value** of your firm.

You establish an “electronic link” to your clients via the portal, it becomes an **important supplement** to the personal relationships you have with your clients.

Your firm’s **identity** with your client will be **strengthened** by the fact that whenever they **interface with the portal**, your firm’s **brand** and the value of the services you provide them will be continually reinforced.

The more you can enhance your client relationships via automation, the more you increase the value of your firm.



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A more indirect benefit of deploying a client portal is the impact it has on enhancing your firm's **image** in the marketplace.

Make no mistake about it; the evolution to a more virtual marketplace for the exchange of business information is going to expand rapidly in the near term.

A portal demonstrates that your firm **understands** the importance of this characteristic of the 21st century business model.

That will help you attract young entrepreneurs as clients as well as young staffers entering the profession.



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Quick Links

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- About Us
- Services
- Latest news
- Calculators
- Links
- Secure FTP
- Contact Us

Welcome to

This website has been designed to introduce you to our company and the services that we offer as well as being a helpful resource tool for your business. offers a range of accounting and taxation services to both small to medium businesses and private individuals. Through our strong and close association with our clients we have achieved consistent growth in our business over the many years we have been in the Glen Waverley area. From small beginnings in 1980 our practice has grown to include five qualified accountants, ably assisted by our two dedicated support members.

Our Philosophy

- We aim to provide a high standard of professionalism to all our clients.
- We are continually assessing and improving our in-house technology and office procedures to ensure we provide you with the most efficient service possible. We have regular staff training sessions and attend numerous seminars to ensure that our advice to you is accurate and relevant.
- We strive to develop long-term relationships with our clients and indeed, have seen many of our long-standing business clients successfully grow and develop their businesses.
- We see our role as your complete small business advisors. With our strong focus on building client loyalty, we are always available to discuss any matters with you in complete confidence.



Latest news

- Powers of Attorney
- Donation Requests
- Scams
- Pension Payment Minimums - 2010/2011 - Update
- Delays in Processing 2010 Income Tax Returns
- Incorrect Super on Payment Summaries

more...



Chartered Accountants

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Latest News

Wednesday, October 13, 2010

Latest Accounting News Service

Hot Issues

- Powers of Attorney
- Donation Requests
- Scams
- Pension Payment Minimums - 2010/2011 - Update
- Delays in Processing 2010 Income Tax Returns
- Incorrect Super on Payment Summaries
- Use a Registered Tax Agent to Improve Cash Flow
- Tax Debts Deferral
- Tax and the Non-resident Investors
- Deemed Dividends
- Making Investment Decisions - Have you done your Research?

Articles archive

- Quarter 2 April - June 2010
- Quarter 1 January - March 2010
- Quarter 4 October - December 2009
- Quarter 3 July - September 2009
- Quarter 2 April - June 2009
- Quarter 1 January - March 2009

Powers of Attorney

A Power of Attorney entitles a person to act on behalf of another in financial or medical decisions.

It is essential that you give these powers to a relative or person that you trust and as the legislation differs in each state, you should obtain reliable advice.

A Standard Power remains in place until it is revoked or the person giving it loses their legal power.

An Enduring Power continues after the person giving it loses legal capacity to make decisions.

A Medical Power gives the person receiving it (only one) the ability to make medical decisions when the person giving the appointment is unable to make such decisions.

This is an extremely brief summary and competent advice should be sought.

Email Us



Web strategies for Accountants and Financial Planners

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You didn't go into business because you love paperwork...

- Why our clients love us
- Compare us

Welcome to Accounts HQ

Accounts HQ is based in Perth, Western Australia and provides accounts and bookkeeping support to small and medium sized businesses across the state.

Much more than just a bookkeeper, Accounts HQ started out in 2006 to help small businesses with the ever increasing paperwork burden. Over the last four years, our reputation grew and so did our company into the multi-industry outsourced accounts and bookkeeping firm we are today.



Latest news

Mar 31 Accounts HQ BAS Service Provider status update
From 1 March 2010, new legislation known as the Tax Agent Services Act 2009 took effect. [more](#)

Mar 31 Accounts HQ becomes a Xero Certified Advisor
We're very excited to announce that we now not only Xero partners, but classed as Certified Advisors. [more](#)

[Visit our blog](#)

08 6240 2222

Free information paper

"Top 5 things to consider when choosing a bookkeeper"

» Download now!

» Request a quote

Would you like to know the impact of every business decision before you make it?

“When was the last time you analysed your property investments? Like to make sure you are achieving the best returns?”

[Read more](#)

Hot Topics

Online Access to Your Files

How would you like to have all your accounting information such as tax returns and financial statements available to you instantly online?

Lockwood and Ward is pleased to introduce a new secure, efficient, and convenient online service to its clients which will dramatically change the way we interact electronically. The service, which has been integrated into our website, allows us as well as our clients to upload and download confidential information, tax returns, MYOB files and more. For those security conscious users, it boasts the same level of security provided by online banking systems and is much more secure than e-mail. Your files and personal information will be safe and secure.

[Read more](#)

What is Job Costing and should you use it?

Don't let the term Job Confuse you. Job Costing is a powerful way to analyse the information that you already have in your MYOB file. Whether you would like to track the profit made by separate departments, on a state by state basis, product line or perhaps even a sales sales person, Job Costing is the way to do it.

[Read more](#)

Links & Feeds



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Surname

Email*

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Tag Cloud

EFFICIENCY

Many firms are beginning to realize that using email as the primary method of exchanging electronic documents and files is very inefficient.

Outlook is not a filing cabinet, how much time do you and your staff waste searching for files sent by clients?

How much time do you waste re emailing files that clients 'did not receive'

Just stop to think about what's involved in sending a client a paper copy of their tax return in comparison to posting it to your portal.



THE CLIENT EXPERIENCE

Have you ever thought about the client experience?

Your client wants to send you their 40Mb MYOB file

A 40MB email attachment is going to take over 30 minutes to upload – and that is if IF it doesn't fail at least once

30+ minutes of no email/repeated attempts/frustration/irritation

One firm's client took 22 attempts to send a 30mb file last year

Imagine how impressed you clients would be with a simple efficient and secure portal



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SECURITY

As accountants we cannot continue to ignore the fact that email is not secure.



Did you know that emailing a TFN is breaching the Privacy Act?
Did you know that in many US States it is illegal to email financial information?

A Portal only takes a minute

Set up a client
on the system
an email
automatically
sent to your
client with
Password &
login
(20 Secs)

You upload a
file to the
folder
(25 Secs)

An email is
instantly &
automatically
sent to your
client with the
link to the file
(Automatic)



You create
a Secure
folder for
your
client on
the site
(10 Secs)

You release
the folder
(5 Secs)

Your client
logs in &
downloads
the file

Come visit us at our stand



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