



'Done For You' Accountant Websites

Cashflow Manager Pty Ltd
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A website is vital for your practice for a number of reasons such as:

- ❖ Providing the right impression to your existing and potential clients
- ❖ Providing the right impression to potential employees
- ❖ Providing information to your clients
- ❖ Positioning yourself as an expert in your field
- ❖ As a tool for people to find you. (Many people no longer use Yellow Pages. They simply 'google'. For example, if they googled 'Accountant Your Suburb' would they find you?)

As a partner of the profession for almost 20 years, Cashflow Manager's 'Done for You' websites not only create the most professional looking website, they also provide frequently updated articles, content and information that position you as an expert in your field.

And it is all done for you. There is nothing more to do than complete the following form and provide a few pictures. Everything will be **done for you**. So to get your website up and running now, simply complete the attached information, and forward to us at the address, fax or email listed above.

Practice Information

Practice Name _____

Practice address _____

Phone _____ Fax _____

Email _____

Cashflow Manager Member ID _____

Website contact _____

Practice Slogan _____

Primary logo colour(s) (PMS colours or RGB breakdowns if known) _____

Copy of letterhead? (Required to match colours and fonts)

Professional Association Memberships _____

Other memberships you want included _____

History

When did the firm commence? _____

Who were the initial principals? _____

What changes have occurred? _____

What is different about your firm? _____

How many staff do you have? _____

Your people:

Please include information about your partners and any other people you would like included.

Person 1

Name _____
Role _____
Qualifications _____
Interests _____
Photo?

Person 2

Name _____
Role _____
Qualifications _____
Interests _____
Photo?

Person 3

Name _____
Role _____
Qualifications _____
Interests _____
Photo?

Person 4

Name _____
Role _____
Qualifications _____
Interests _____
Photo?

Person 5

Name _____
Role _____
Qualifications _____
Interests _____
Photo?

Would you like a team photo included on the site?

Website

Preferred domain name? _____

Please tick if you already have this domain name? Please tick if you already have a website?

If you do not already have a domain name, please tick if you would like us to obtain one for you?
(Please note: fees to acquire the domain name on your behalf will be additional as will any fees to set up email address with your domain name.)

Alternative domain name? _____

What Template would you like to use? (View at <http://www.yourfirmwebsite.com/>) _____

What Services Do You Provide? (Note: We will send you the standard text for the services you select so you can advise any changes you require.)

- | | | | |
|--------------------------------|--------------------------|----------------|--------------------------|
| Accounting, Tax and GST | <input type="checkbox"/> | | |
| Business Coaching | <input type="checkbox"/> | | |
| Business Start Ups & Sales | <input type="checkbox"/> | | |
| Financial Planning | <input type="checkbox"/> | Referral only? | <input type="checkbox"/> |
| Insurances | <input type="checkbox"/> | Referral only? | <input type="checkbox"/> |
| Loans and Mortgages | <input type="checkbox"/> | Referral only? | <input type="checkbox"/> |
| Management Consulting Services | <input type="checkbox"/> | | |
| Primary Production & Farmers | <input type="checkbox"/> | | |
| Self Managed Super Funds | <input type="checkbox"/> | | |
| Vehicle & Equipment Finance | <input type="checkbox"/> | Referral only? | <input type="checkbox"/> |
| Other (please advise) | _____ | | |

Do you want a Client Services Directory to advertise your clients?

Do you wish to include a 'Careers/Recruitment' page?

Important Information:

1. 'Done for You' Accountant Websites are developed by Cashflow Manager Pty Ltd with the assistance of practice management specialist Pat Camm from P J Camm & Associates Pty Ltd. Wayne Burgan from Cashflow Manager and Pat Camm have both run successful accounting practices themselves and been involved in the profession for over 25 years.
2. The fees for development and hosting are based on selection of the standard websites together with any changes (such as changes in wording) agreed to at the time of development. Substantial changes from the 'done for you' templates may result in additional fees. However, any such fees will be agreed before proceeding. Similarly, additional features that become available such as a client secure area and eCommerce facilities may also result in additional fees in relation to both development and hosting.
3. The fees are current as at 1st September 2009 and are subject to change.
4. The fees for website development do not include fees payable to third parties for your domain name. In the event that the developers arrange domain names for you, fees for registering the domain and ongoing renewal fees will be payable to Cashflow Manager Pty Ltd. In the event that any such fees are not paid, Cashflow Manager Pty Ltd reserves the legal right to the domain name.
5. Your website is developed in .Net portal technology and the copyright belongs to Cashflow Manager Pty Ltd and/or its licensors. In the event that you wish to transfer your website to an alternative host, your website or some sections such as the 'resource library' and other articles may be no longer available for your use.
6. Any photographs e.g. your people and your office need to be supplied by you although we can send professional photographers if required (at your cost). Photographs can be supplied in a .jpeg, .bmp, .png or .tif format. Please note that photographs may require editing by the developers. If photographs are not supplied within reasonable time Cashflow Manager Pty Ltd reserves the right to publish the website without them.

CUSTOMER DIRECT DEBIT REQUEST SERVICE AGREEMENT

OUR COMMITMENT TO YOU

This document outlines our service commitment to you, in respect of the Direct Debit Request (DDR) arrangements made between Cashflow Manager Pty Ltd, User ID 188481 and you. It sets out your rights, our commitment to you and your responsibilities to us together with where you should go for assistance.

INITIAL TERMS OF THE ARRANGEMENT

In terms of the Direct Debit Request arrangements made between us and signed by you, we undertake to periodically debit your nominated account for the agreed amount.

DRAWING ARRANGEMENTS

- The first drawing under this Direct Debit arrangement will occur immediately.
- If any drawing falls due on a non-business day, it will be debited to your account on the next business day following the scheduled drawing date.
- We will give you at least 14 days notice [in writing or some other means of your choice] when changes to the initial terms of the arrangement are made. This notice will state any changes to the initial terms.
- If you wish to discuss any changes to the initial terms, you can contact us by phone, or by fax or email.

YOUR RIGHTS

CHANGES TO THE ARRANGEMENT

If you want to make changes to the drawing arrangements, contact us by phone to Cashflow Manager Administration on 1300 88 78 68. These changes may include:

- deferring the drawing; or
- altering the schedule; or
- stopping an individual debit; or
- suspending the DDR; or
- cancelling the DDR completely.

ENQUIRIES

Direct all enquiries to us, rather than to your financial institution, and these should be made at least 7 working days

prior to the next scheduled drawing date. All communication addressed to us should include your Member ID.

All personal customer information held by us will be kept confidential except that information provided to our financial institution to initiate the drawing to your nominated account.

DISPUTES

- If you believe that a drawing has been initiated incorrectly, we encourage you to take the matter up directly with us by contacting our administration section on 1300 88 78 68 during business hours.
- If you do not receive a satisfactory response from us to your dispute, contact your financial institution who will respond to you with an answer to your claim:
 - within 7 business days (for claims lodged within 12 months of the disputed drawing) or
 - within 30 business days (for claims lodged more than 12 months after the disputed drawing)
- You will receive a refund of the drawing amount if we can not substantiate the reason for the drawing.

Note: Your financial institution will ask you to contact us to resolve your disputed drawing prior to involving them.

YOUR COMMITMENT TO US

It is your responsibility to ensure that:

- your nominated account can accept direct debits (your financial institution can confirm this); and
- that on the drawing date there is sufficient cleared funds in the nominated account; and
- that you advise us if the nominated account is transferred or closed.

If your drawing is returned or dishonoured by your financial institution, we will contact you by telephone or in writing and suspend your website until payment, including any transaction fees payable to us in respect of the above are paid in full.

We also reserve the right to take alternative action to recover any amounts outstanding including any transaction fees payable in respect of drawings that are returned or dishonoured by your financial institution.

Cashflow Manager Privacy Statement

The personal information Cashflow Manager Pty Ltd collects will be used by Cashflow Manager Pty Ltd to administer support and for marketing, planning, research and product development purposes. If you do not provide us with the information we may not be able to provide you with the foregoing.

This information may be disclosed to service providers who do things on our behalf or to other third parties where it is required by law, or where you have otherwise consented. You consent to the information provided on this form being collected and retained by Cashflow Manager Pty Ltd.

You can access the personal information we have collected, if we have retained it, by telephoning 1300 88 78 68.

Cashflow Manager Pty Ltd advises that it may pay commissions to third parties in relation to its products and services.