retinue

Client Cheat Sheet

Essentials

This is your client cheat sheet – everything you need to know about Retinue on a page, including key tasks to ensure our partnership is successful.

Onboarding

Our Account Managers will guide you through the onboarding process to ensure you are set up as quickly as possible. Below are the key steps:

- We will get you set up on Xero (or get access to your existing accounting file, Xero/MYOB, if you already have one).
- Join an onboarding meeting to help us understand your business and your needs in detail, including if there is any outstanding work you need our help with.

Bookkeeping

- Please ensure your business bank account feeds are connected or send through all receipts and invoices via Dext or MYOB by the end of each month.
- Answer any queries on your account each month so that we can keep your books up to date.

Tax

- We commence work on EOFY returns from 1 September each year, once all information is available with the ATO.
- We will send you an EOFY checklist - Please ensure you complete this during Oct – Nov.
- Thoroughly check draft returns for completeness prior to lodgement.
- From April each year we are here to help with any EOFY tax planning needs that you or your business have – please reach out!

Reporting

- We will send you your monthly profit and loss statement by the 15th of each month.
- If you would like to discuss your monthly statement with an accountant, feel free to request a meeting via the below support channels.

Support

We provide 24/7 support and if you ever want to meet with one of our accounting or bookkeeping specialists you can do so via the following options.

client@retinue.com.au | 1800 861 566 | Book a meeting