

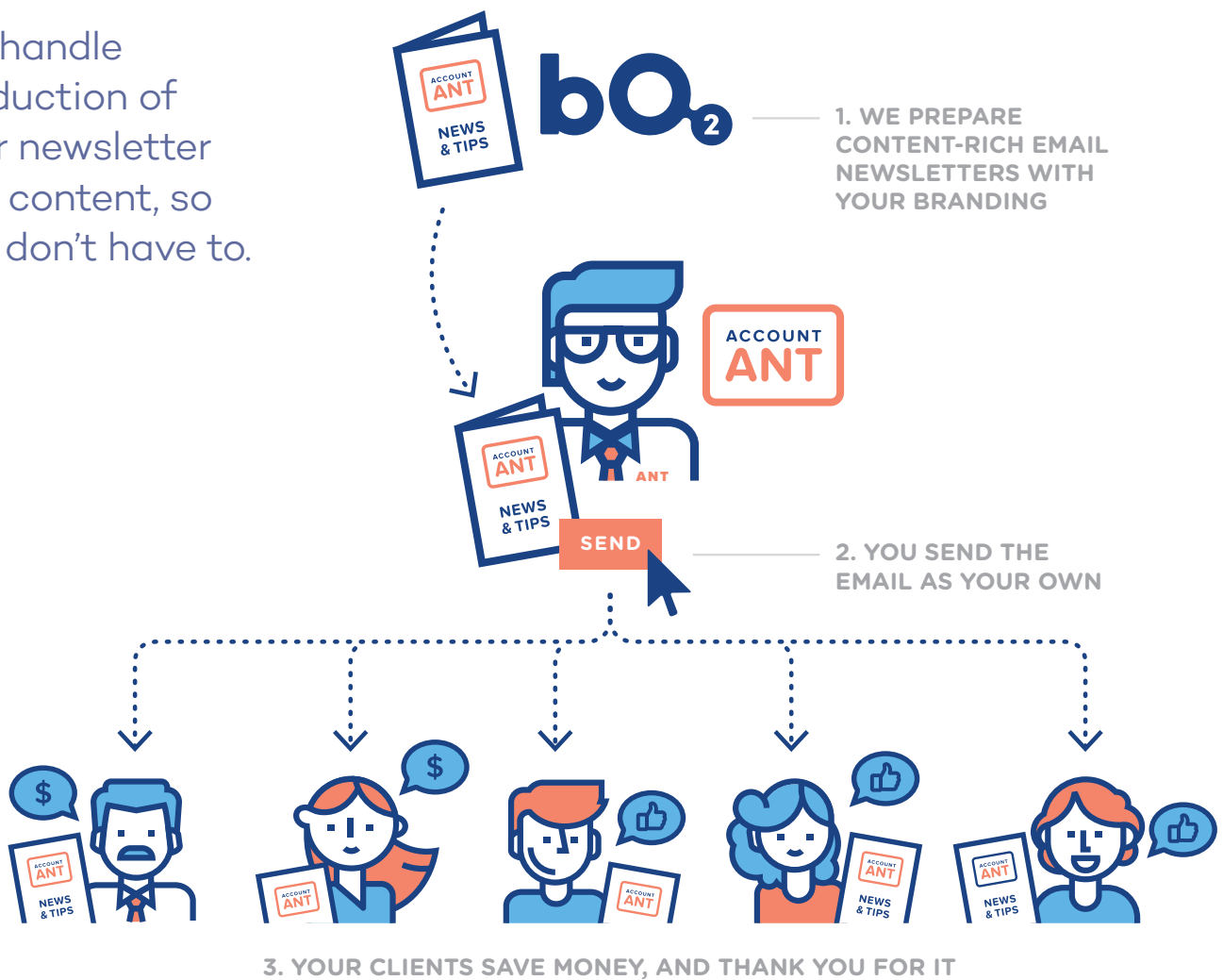
Tax Essentials **ClientConnect**

A White-Label E-Newsletter Partnership



How Does Client Connect Work?

We handle production of your newsletter and content, so you don't have to.



What Is bO₂ ClientConnect?

A white-label e-newsletter partnership that will bring a new vitality to your practice through the essential modern-day practice of value adding for your clients.

bO₂ ClientConnect e-newsletters are produced by bO₂ Tax Essentials, but branded and marketed by you to your clients. Rather than setting up your own production infrastructure, purchasing white-label newsletters allows you to recover time, reduce costs, engage with your client base and most importantly focus on your core competencies—being an accountant!

White-labelling means that our e-newsletters have no mention of bO₂, so you can apply your logo and send it as your own.

bO₂ ClientConnect will help you provide your clients the latest tax news and promote your services without investing in extra staffing, infrastructure or technology.

The result: *You can confidently focus on building your business while adding great value to your clients.*

Why White Label?

Your clients associate the product with your business and the newsletters as being your own creation!

As a practice owner, you get to a point where you can't do everything you'd like to. Clients ask for new services and it can be tough to say no when you don't have time — ever wanted to be your own author but found you're too busy being an accountant?

That's where bO₂ ClientConnect can be the perfect partner for your firm.

Having your own Newsletter can:

- Increase revenue and profits
- Help your practice appear larger and more trustworthy
- Make clients happier by offering more services
- Help you engage with your client base on a regular basis
- Encourage your clients to contact you

To some, CA's/CPA's are dull and colourless, but to SMEs, they are trusted advisers, valuable sources of information and providers of many services. In the small and medium enterprise (SME) world, the accountant holds the status of a hero, one who fights for entrepreneurs against the incubus of fiscal policy or considerations and government regulation.

This is substantiated in a number of surveys where clients say their accountant brings a lot of value. According to a recent independent practice study, 66.5% of companies consider their accountant and lawyer the most valuable source of information. Practice and trade associations rank lower, at 35%, followed by other small businesses (19.8%) and suppliers (12.3%).

Caring about your clients is one of the best ways to differentiate your practice and gain long-term consumer loyalty. Adding to clients' buy-in will result in retention and growth of business.

Two ways to show clients they're important:

- Touch base often. It's simple: And be proactive with updates.
- Go the extra mile. Constantly look for ways to make the service you provide just a little bit better

The traditional role of the accountant is being diluted as a result of disruptive technology, but that just means that accountants are being freed up to take a greater role in the practices where they are employed. Promote your value to your clients.



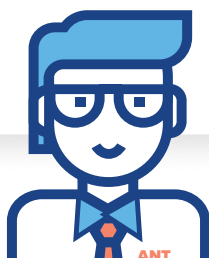
What Makes bO₂ ClientConnect White-Labelling Different?

Quality and experience

We've been producing workplace guides and business publications since 2006 and in providing our services to thousands of members ranging from owners or directors of small to medium sized companies (SMEs), CFO's or senior executives of some of the most renowned multinational corporations we've gained a plethora of experience. Our quality and price are unmatched in the market and that's why our retention rate is nearly 100%. We understand the urgency and importance of having your newsletters ahead of schedule, and we set clear goals and timelines in order to deliver.

Our annual partnership plan list is full of members who have had plenty of white label experience elsewhere. They cite many of the same frustrations, from inconsistent work, struggles with communication, and unreliability being the main concerns. At bO₂ Corporate Essentials (formerly Tax Smart Australia or TSA), you have a partner with an established business footing, we're easy to communicate with, and have a great track record working with the Australian business community.

BO₂ Corporate Essentials provides publications that can be easily read, understood and actioned by a layperson — without the burden of costly fees of high priced lawyers, brokers or consultants.



Our own in-house production

Do You Have Your Own Writers And Production Team Or Is It Out-Sourced?

Absolutely in-house. We've got a great team and a fun environment too. We take pride in our work, and believe our publications speak for themselves.

Our writers and team of experts have over 45 years combined experience in their specialised fields as Tax accountants, safety specialists, IR and HR professionals, and all have a shared appreciation of and commitment to national compliance standards. bO₂ Corporate Essentials has been established with the aim of providing publications that can be easily read, understood and actioned by a layperson – without the burden of costly fees of high priced lawyers, brokers or consultants.

Our company success, reputation for great customer service and ongoing support, product excellence, reliability and affordability is the collaboration of many minds; most importantly, our thousands of subscribers; their valued feedback, engagement with our online services and interaction through our free research department, essentially keeps us committed to maintaining benchmark results. Our writer's constant research and use of the latest resources; Our IT and administration team's key processes and innovative product development; also our sales consultants' ability to utilise their product and service knowledge responsibly with a commitment to their duty of care.

bO₂ Corporate Essentials (formerly Tax Smart Australia or TSA) is a privately owned company and since being founded in 2006, has grown to be one of Australia's largest business publications specialising in current Taxation, Financial and Employment issues that impact on Small to Medium business owners and professionals.

How Will My Clients Benefit From bO₂ ClientConnect?

Your clients associate the product with your business and the newsletters as being of your own creation!

Here are 5 business areas that bO₂ ClientConnect adds value to your clients' businesses:

Business plans 1

Small businesses are discovering the value of involving an accountant when writing their business plans.

- Through bO₂ ClientConnect, you'll provide useful insight into key practice indicators and your clients' target markets.
- Your expertise in these key areas can help businesses become financially stronger and more agile.
- This puts them in a better position discuss with you how to best take advantage of new opportunities as they arise.

Delegation 4

Small business owners love control. But as their business grows, so do their responsibilities.

- You can take on some of those duties. Giving them the freedom to improve their customer service, do more creative work, and grow their business. After all, very few business owners started out with a desire to do lots of bookwork or manage compliance.

Finances 2

Small business accounting can quickly become complex, particularly when managed in-house..

- This is where you can help. They can quickly get their company back on track, with additional info coming from you, the Accountant, on payroll, cash flow and other areas. bO₂ ClientConnect gives a quick and comprehensive overview of this vital information

Legal Structure 3

Not all small businesses fit into the same legal box. Every structure, whether it's a sole trader, partnership, a Trust or company, has different considerations with respect to liabilities and taxes.

- By supplying your Clients with bO₂ ClientConnect, you can explain these legal practice structures in simple terms. That in turn will help your clients choose the one that provides them with the greatest benefit and protection from risk.

Compliance 5

As businesses grow, the complexity and labour involved in compliance can increase dramatically.

Compliance doesn't have to be difficult...

By providing your clients with your own newsletters you can:

- Follow compliance issues facing business owners.
- Differentiate your business from your competition.
- Keep the business owners up to date with the latest tax laws.
- Keep control; we have no direct contact with your client whatsoever – the relationship is yours to manage always – your client doesn't know we exist.

By ensuring small businesses stay in compliance, an accounting professional provides a highly visible and tangible example of their value to a small business.

In addition, your knowledge of tax laws and legislation is highly valuable. You can use ClientConnect to suggest ways to free up cash flow, save money and raise capital for expansion.

How Much Does ClientConnect Cost?

The price of our 12 month plan depends on the number of clients that you upload into your ClientConnect portal.

ClientConnect	Small Business	Standard	Premium
Number of Clients	1-250	1-750	1-1500
Client List Management (including Bulk Upload)	✓	✓	✓
Send to all clients or a selected list	✓	✓	✓
Easy to use email templates	✓	✓	✓
Editable email subject line and email body	✓	✓	✓
Multiple brand option	✓	✓	✓
Telephone support	✓	✓	✓
Mobile-optimised emails	✓	✓	✓
Mobile-optimised newsletters	✓	✓	✓
Articles per newsletter	8-10	8-10	8-10
Newsletters per year	12	12	12
Your logo and company details on the newsletter	✓	✓	✓
Your logo and company details on email footer	✓	✓	✓
Place in your client portal	✓	✓	✓
bO₂ Tax Essentials Premium (Value \$639)			✓
Pricing			
Annual Subscription	\$57.90	\$1932	\$2730
Monthly Subscription	\$ 694.80	\$161	\$227.50

Note: for those requiring 1500+ an additional charge of \$50.00 per 500 emails a month applies. This charge will be automatically added to your monthly instalment amount. Please let our team know if this applies to you.

Confidentiality

We're everyone's best kept secret. As with our own business; we understand how important confidentiality is to you!

Do you have a Non-Disclosure Agreement?

Yes, non-disclosure is very important; both parties' secrecy obligations are covered in The Licence of Intellectual Property. We are completely invisible to your clients and leave no trace in the code, it's a true white-label experience.

Who are some of your white label members?

Shhh... We will never tell. One of the major aspects we pride ourselves on is privacy. You'd know a few of our partners to be sure, but we keep our relationships private, and we'll keep your secret too.

Can I place the newsletter on my website?

Newsletters can be placed on your website where a login is necessary for the client to view the publication e.g. a client area. It is a breach of the Copyright Act 1968 for them to be made available to the public.

What Types of Businesses have already partnered with bO₂ ClientConnect?



Education / Universities



Lawyers / Barristers / Solicitors



Accountants / Bookkeepers / Financial Planners



Professional Associations



Finance Brokers / Institutions

FAQ

How does bO₂ ClientConnect white label work?

Whether you're just starting up or have a small client base or require 1500+. We offer scalable pricing and solutions to support your growth.

Do I have to sign a contract?

Yes, this to ensure that both our respective business interests are protected, everything is clear and there is no confusion. Besides, it is a good and standard business practice. Don't worry though, the agreement is only one page in length and not complex. It is all signed electronically so it is quick, simple and easy to complete.

How do I charge my clients?

There is no change from how you likely do it now. You would charge, invoice and collect payment from your client as you ordinarily would.

You have complete flexibility and discretion in how you structure your client's payments. Our current partners approach charging for the e-newsletters in two ways:

- Through marketing or otherwise, they identify prospective and/or existing clients and agree the payment terms with them; or
- Others choose to add value to their existing service by gifting the monthly newsletter to their clients free of charge.

Ultimately, we suggest that you be creative with the way you package it up. Always be focused on the needs of your clients. We can certainly help you shape this should we work together.

Can I see samples of the newsletters?

You certainly can. Open www.bo2.com.au/clientconnectsample

How do we get started?

The simple 5-stage process for getting started is as follows:

- 1. Complete the new client registration form.**
- 2. Product and Direct Debit Agreement.** on receipt of your registration details, we will prepare the agreement that will be sent to your email address for e-signing together with the associated invoice for payment.
- 3. E-signing of the agreement and first direct debit payment.** You will e-sign the agreement, which we will countersign electronically.
- 4. Content customisation and portal set up.** If you want us to assist with your portal set up, including adding your logo and uploading your client list, please let us know.
- 5. Send your first e-newsletter.**

Do you have any contact with my client?

Absolutely not! We have no direct contact with your client whatsoever – the relationship is yours to manage always – your client doesn't know we exist.

WE PRODUCE IT — YOU SEND IT

You retrieve the newsletter/s from the secure portal; customise the product with your own brand, logo and identity, allowing clients to associate the product with your practice. Then you simply send the newsletter to your uploaded client list. Once again, we have absolutely no contact with your client here. The client relationship is yours to manage.

Do I or my practice have to hold a bO₂ Tax Essentials Standard or Premium Membership before entering into a white labelling annual partnership plan?

No, it's not a deal breaker... though we would advise having at least a bO₂ Tax Essentials Standard Membership because:

There are many areas relating to the accountancy profession such as taxation legislation, where knowledge acquired is out of date within 12 months. Increasingly it is not about what you know; it is about knowing how to find out.

bO₂ Tax Essentials Provides you with the following benefits

- Save time on keeping up to date with taxation law
- Have a great source of tax reference material at your disposal
- A second professional opinion, without the expense
- The ins and outs of Fringe Benefit Tax
- Superannuation tax law and compliance demystified
- Learn how to deal with payroll issues including Salary Sacrifice, Salary Packaging and Negative Gearing
- Personal tax information regarding investments, shares, trusts and much more
- Advice on audit activity
- Unlimited free research department

Why pay thousands of dollars for a second opinion or lose valuable billable hours on research when you can save with bO₂ Tax Essentials Standard and bO₂ Tax Essentials Premium, Australia's leading tax information publications.

FAQ (cont.)

Do you offer any marketing tips/ tools for the service?

The way you approach how you market your business is entirely up to you. Each business is different so it is not something we tend to help individual partners directly with.

What is available in terms of client support for me?

You get access to our dedicated customer service team that you can call on our toll free number at any time during business hours; you can confidently provide them with instructions on what help you need. We also have technical experts in our office that can support you when needed throughout the work day.

What are your payment terms?

- **Direct Debit:** Pay by simple monthly instalments via Direct Debit; or
- **Full Year:** Upon agreement, you can pay the full amount for your partnership plan by contacting our office to have an invoice raised.

All invoices are due as per the invoice terms and are non-refundable.

A guaranteed 14 day cooling off period, in case you change your mind.

What's included in the price?

For an annual partnership plan, we set the package prices based on how many clients you wish to send the newsletters to. It's included in our pricing to provide an easy-to-use dashboard, security features and much more. You don't just get the bare minimum, but an e-newsletter that you're proud to deliver to your clients.

COPYRIGHT LICENSE

With this purchase, you will have copyright license to ClientConnect newsletters, add your brand logo and distribute it externally to current and potential clients.

What you get as a licensed bO₂ Corporate Essentials 'ClientConnect' partnership plan holder

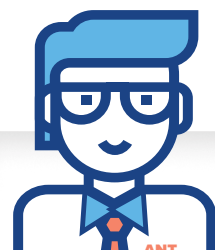
- Your own branded Monthly Newsletter
- A license to distribute your branded newsletter to your agreed contracted client base.
- A guaranteed 14 day cooling off period, in case you change your mind
- Pay annual subscription by simple monthly instalments
- Guaranteed non disclosure from bO₂.

What you're not allowed to do:

- Change or amend the product without written consent
- Sub-License the product

Are you intrigued to find out more about how any of our products & services can help improve the profit you are making in your business?

Visit www.bo2.com.au and discover more.





Tax Smart Australia

bo2 | Corporate Essentials Pty Ltd as
Trustee for The TSA Unit Trust

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