Make running your own practice a reality.

Accounting | Tax | Advisory & Consultancy

Success Tax Professionals

Join our franchise

SUITABLE FOR

NON-TAX AGENTS & TAX AGENTS



We've been providing our well-established and supported franchises since 2003.

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Read the information package and now want to advance your inquiry?

See page 36.

A. CORPORATE DIRECTORY

1. Franchising division management

Executive management



Franchise recruitment | Intellectual property development | Network and outreach facilitation | Quality and performance | Marketing facilitation

Tracy James Managing Director (Executive) & Co-founder

Together with Darren Gleeson, Tracy James is a co-founder of the Success Tax Professionals franchising business and of TaxFitness (a dedicated software and learning platform for tax planning, business advisory and business benchmarking).

Tracy has received awards for project implementation and learning and development for a series of innovative concepts and programmes she created, cultured and rolled out in the workplace for major government departments. Tracy's awards include an Australia Day Achievement Award administered by the National Australia Day Council and an Australian Training Award (ATA).

Before Success Tax Professionals, Tracy's career history included 20 years experience in senior management positions in national customer service organisations including large call centres and government departments where she was responsible for change management and performance initiatives.



Franchise programmes | Practice acquisitions | Technical support programmes | Learning programmes | Strategic management

Darren Gleeson Training Director (Executive) & Co-founder

Darren Gleeson has been involved in the accounting public practice industry for over 30 years and is a co-founder of the Success Tax Professionals franchise group and TaxFitness (www.taxfitness.com.au).

Darren has a Bachelor of Business (Accounting) degree, Diploma of Financial Services (Financial Planning), Certificate IV in Finance and Mortgage Broking, Graduate Diploma of Applied Finance and Masters of Business Administration. Darren is also a member of the Institute of Company Directors, CPA Australia and a registered tax agent.

He is a published author of twelve accounting industry business books targeting practice improvement, tax planning, advancing practices to provide consultancy services, working with the TaxFitness systems and the most recent addition – The Accounting Profit Blueprint (managed, co-ordinated and funded by our TaxFitness sister business).

Digital marketing and branding



Digital marketing | Marketing analysis | Social media | SEO and campaign management

Roydon Snelgar Marketing Manager

Roydon founded Pixelpi in 2012 to fill a quality gap in the digital marketing industry. Pixelpi connects businesses with customers through relationship-focused content-driven online marketing. Roydon advocates long-term holistic strategies that build gradually over time with durable far-reaching impact rather than temporary quick fixes.

Roydon has extensive experience in the industry and a results-oriented record, having worked in marketing for 20 years and digital marketing for over 15 years. He has an undergraduate degree in Marketing and a Master's in Business Administration from Curtin University of Technology.

2. Supervisors for non-tax agent franchisees

Tax Agent Incubator Supervisors (guide only)

- Muhammad Sajid (ACT)
- Nishan Senaratne (WA, VIC, NSW)
- Murray Frean (WA)
- Eva Chan (QLD)
- Ronel Kruger (QLD)
- Olivia Tran (QLD)
- Brett Nangle (VIC, NSW)

(Please note supervisors can change and the above are a guide. You supervisor does not have to be in the same state.)

Supervisor numbers and status

(We modify the number of supervisors and locations as needed to accommodate recruitment. Supervision is a legal requirement for non-tax agent recruits.) All supervisors are registered tax agents in our network.

Supervisors are limited to a maximum of 7 non-tax agent recruits (franchisees).

Understanding professional body memberships

Tax agents and tax agent supervisors who perform supervision in our Tax Agent Incubator Programme (TAIP) may belong to various professional accounting bodies and hold a Public Practice Certificate (PPC) – e.g. with IPA and CPA.

Professional body membership is not compulsory for either tax agents or non-tax agents. It is tax agent registration with the Tax Practitioners Board and either holding a current licence to operate as a tax agent or working under the supervision of a tax agent that permits a practitioner to provide tax services and charge a fee for those services (not professional body memberships).

3. Memberships and registrations of the franchisor

- Tax Practitioners Board (Tax Success Pty Ltd, Tax Agent No. 2622 6839)
- National Tax and Accountants' Association (NTAA)
- Australian Institute of Company Directors
- Certified Practising Accountants (CPA)
- TaxFitness – Tax planning specialist software and learning platform

Tax Agent
26226839

4. Social media and connections

5. Franchising division contact details

Unit 6/50 Ladner Street
O'Connor WA 6163

PO Box 1073
Fremantle WA 6959

Telephone: (08) 9337 4440
Email Inquiries: stp@stptax.com
Web-page: http://www.stptax.com/

Tracy James (Director) M: 0402 053 821 | E: tracy@stptax.com
Darren Gleeson (Director) M: 0412 842 856 | E: darren@stptax.com

B. SERVICES COVERED | BRANDING | FRANCHISE FEES | UNRELATED SERVICES | TERRITORIES & ADVERTISING AREA | GETTING CLIENTS

1. Services our franchisees may provide – core services

Each franchisee may carry on the business of providing the following Success Tax Professionals services.

✓ Franchisees can choose which services they want to provide based on their interests, motivation, qualifications and licences and expand on these over time.

✓ Franchisees can also diversify and choose to outsource work to other franchisees in the group and discuss referral fees. For example, sometimes a franchisee wishes to keep the client's compliance work but may choose to refer SMSF audit work to a qualified franchisee.

ACCOUNTING:

- Accounting services (including the preparation of financial statements),
- Bookkeeping,
- Business advisory services (including profitability, value and potential sale),
- Business structure set-up and advice (including partnerships, trusts, companies, sole traders and self-managed super funds),
- Audits (including of self managed super funds),
- Wealth generation advice (including investment, finance, tax, structure and asset protection advice),
- BAS services (preparing or lodging an approved form about a taxpayer's liabilities, obligations or entitlements under the provisions dealing with Business Activity Statements (BAS); giving advice about the BAS provisions, or dealing with the Commissioner's delegate in relation to a BAS provision),

TAX:

- Tax services (preparation of income tax returns for individuals, sole traders, partnerships, companies, trusts and super funds).
- General tax compliance.
- Private rulings.

ADVISORY AND CONSULTANCY SERVICES (TAX PLANNING, BUSINESS ADVISORY, BENCHMARKING):

- Providing consultancy services that investigate and apply an extensive range of tax-saving strategies for suitable clients (e.g. businesses and investors and where appropriate, suitable clients in the 'individuals' category). Visit our sister business TaxFitness – we've made it our business to elevate services to consultancy levels – www.taxfitness.com.au. Franchisees can choose to progress to working in advanced services that are high-fee-generating services.

2. Non-tax agents and tax or BAS services

I. Authorisation for non-tax agents

Our services cover a wide range of industry services as shown in 1. above. Some of these services are regulated by laws as to who can provide them – tax and BAS are examples of regulated services.

Accountants can only perform tax-related advice and complete tax returns for a fee or reward if they are a tax agent or an authorised representative of a tax agent. They can also act as a BAS agent if they are a tax agent (but a BAS agent cannot act as a tax agent). A tax agent is top of the hierarchy.

Our non-tax agents can perform tax and BAS functions because they will be under the direction and supervision of a tax agent and an authorised representative providing they comply with requirements.

After joining the franchise, all non-tax agent franchisees are allocated a supervisory tax agent (STA) under the Tax Agent Incubator Programme (TAIP). The STA delegates on all tax returns and other matters requiring tax agent action.

STAs also provide non-tax agents with timely feedback and guidance for corrective action on work being submitted for lodgement or authorisation. This provides a learning environment.

In the case of tax matters, the registered tax agent delegating on the work is responsible for the accuracy of the work before transacting lodgement.

Success Tax Professionals has a well-developed process for client interviews, use of checklists, collation of evidence, preparation of files and transfer of the required documents and files for processing. In other words — it is systemised.

II. Non-tax agents who are already registered BAS agents

Non-tax agents who hold registered BAS agent status will need to work under the supervisory tax agent (STA) and treat BAS as part of tax agent functions. It cannot be separated out and must go through the supervisor.

3. When can I join the franchise?

You can join at any time of the year and we will organise induction. Work availability is not seasonal.

4. Do you help me get clients (lead generation)? Yes, we do.

I. Greenfield franchise

Our franchises are greenfield franchises. This means they do not come with a starting client base. They come with the opportunity and systems to enter public practice and grow a client base. Systems include training, supervision for non-tax agents, technical support, practice management and marketing systems.

II. Assistance in getting clients

The franchisor invests in various advertising campaigns for the brand, network and each franchise practice to help facilitate business growth and lead generation. This can also significantly enhance a franchisee's own local campaigns.

It is very important to understand that franchisees do need to have funds for local campaigns and should not rely purely on the franchisor's efforts. Franchisees must also advertise so they can have a wider reach and impression (or footprint in the industry).

Here are some ways in which our franchisor activities help our franchisees to gain clients:

a) **Skills:** Ongoing support, mentoring and training so you can manage services competently and generate potential referrals for new business from each client you service.

b) **Office choice:** Demographic assessment for commercial offices such as position, anchor businesses, suburb profile and other factors positively impacting growth.

c) **Complex work referral system:** No one likes to turn work away (client losses occur). As franchisees learn over time, work that is outside of a franchisee's skill set can be referred to other franchisees (for a referral fee) or completed as a training exercise with a supervisor by the franchisee.

d) **Website landing page and store locator listing:** Our official optimised website (which is a site of authority) lists our practices with their own customised content, image gallery and contact details (these are called landing pages and you can help us to regularly develop and update your content). Each practice has its own landing page reflecting the culture, interests and dynamics of the practice.

   Our practices also appear in a 'by location' store directory which is optimised for online searches for consumers using keyword searches specific to accounting and tax services. Practices are classified as 'Business Office', 'Residential Office', or 'Mobile Services'. This allows the consumer to choose the most appropriate option for their needs as well as location. Importantly, they can also check the practice's credibility.

e) **Digital marketing and SEO:** We have comprehensive digital marketing in place continuously. This includes Facebook, YouTube, LinkedIn, Twitter, Google ads, website SEO and paid campaigns to boost online activities and articles authored by Success Tax Professionals. This helps to drive interest to our website, online pages and therefore your practice and profile on our official website.

f) **Profile raising:** Various franchise practices are involved in profile-raising activities such as charity and community projects which we promote online. Brand awareness does not just come from advertising, but also from the contributions a business makes back into society and the community. This helps in establishing a business identity and furthering brand awareness. All franchisees have the potential to benefit from this recognition as it increases online traffic to our pages where you appear.

g) **Content contributions:** We provide quality written blog posts on our website and Facebook pages and these are indexed quickly by Google and greatly improve search results for our business and franchise practices. We create original content whereas the majority of our competitors only copy content and are penalised by search engines. We do the writing and you have the opportunity to benefit from the positive impact this has on search engine rankings and potential lead generation.

h) **Maps:** With careful techniques, we optimise Google Maps and this allows each practice to increase their online presence. We also advocate for Google reviews and independent testimonials which in turn improve online search result rankings and selection by consumers as the preferred choice over competitors. (If you are working from home in the allowable two-year period following your start date you need to be aware that Google may not allow your address to be listed. Where possible we will take steps to work around this.)

i) **Templates and advice:** We provide marketing guidance, one-to-one planning and design guidance for selective material that our franchisees can replicate for various mediums such as advertisements, signage, editorials, directories and leaflets. We help you to determine a marketing direction.

j) **Franchisee Resources Centre:** Access to the full centre including the marketing section, examples and information.

k) **Online bookings:** Help is provided to establish online bookings to increase the opportunity to secure work. This allows potential customers to access an appointment system whenever they want to.

l) **Quoting, engagement letters and lead conversion:** Help to structure quotes, talk to customers and provide content for official contracts (engagement letters) required for business client services.

m) **Testimonials:** Help to gain genuine online testimonials to improve credibility and interest from other consumers. Reviews can help to encourage new customers to access your services with confidence and help in overriding your competitors.

n) **Practice acquisitions:** If fees are available either within the group or externally, we can guide capable and financial franchisees in the steps to make an offer, negotiate contracts and complete due diligence. We also provide practice management advice.

In general, we raise the brand's profile and the credibility of our members and drive business to our online resources, content and contact details for our practices. We let the inquirer choose who they prefer. This keeps the lead generation system objective and transparent.

As the franchisor, we are required to re-invest a minimum of 10% of tax agent franchise fees produced back into group advertising for the network and brand. We are committed to facilitating practice growth. You benefit and we benefit.

5. Fees to charge clients (minimum fees)

Franchisees must charge clients for our services by using our minimum fees document as the 'starting from' price for services. Franchisees cannot set their own fees. This preserves the integrity of the services and places value on the skill, time and professionalism of our service providers who deserve to be paid correctly for their services and not undervalued.

We use industry benchmarking for establishing fees. It is important to understand that low prices sometimes seen advertised by other industry accountants are not indicative of the true rates charged by professional accountants. These are misleading.

6. Grant fee and ongoing franchise fees

These are two types of fees relevant to the franchise. There is a **grant fee** to join the franchise (this is a one-off fee – paid only once). The **ongoing franchise fees** are either a percentage or capped rate based on service fees billed and collected under the brand. These fees are discussed in **SECTION D**.

7. Payment of ongoing franchise fees

Ongoing franchise fees are payable on all Success Tax Professionals services as shown in 1. above. Our services cover a wide range of accounting, tax and BAS services. Depending on whether a franchisee is a non-tax agent or a tax agent the system for paying fees is different. In both cases, fees payable are calculated monthly.

8. Compulsory branding of Success Tax Professionals services

All services covered by the franchise must be branded as and carried out under the brand name of Success Tax Professionals. No other names, brands, logos or identifiers can be used.

9. Unrelated services

All other services such as financial planning, finance broking and mortgage broking, migration services, etc are unrelated services and must not be branded as Success Tax Professionals services. Franchisees offering other services not falling under the Success Tax Professionals agreement must offer these under a different business name and branding. These services are not relevant to the Success Tax Professionals franchise or franchise fees payable. Clients are not to be misled that they form a franchise service.

10. Advertising area

Our franchise has no fixed territories for advertising purposes. This means you can advertise for clients in any area, suburb, or state within Australia. This creates huge opportunities.

11. Franchise territory

Franchisees receive a non-exclusive territory covering all of Australia. This provides franchisees with flexibility and scope to operate a more dynamic and viable business by being able to advertise for business widely and accept business from all areas without restrictions.

It also gives the client the right to choose their accountant and be empowered that they are working with the best person for their circumstances and needs.

('Territory' is different to base location. Base location is the advertised address a franchisee requests approval to use as their servicing point for clients to receive services at (e.g. office or home address). Base location has restrictions to prevent multiple franchisees from occupying and advertising the same suburb as their business address which may be confusing for clients. See **SECTION C**).



C. QUALIFICATIONS & OTHER FRANCHISE REQUIREMENTS

1. Minimum qualifications, experience and background

I. Qualifications and experience for joining our franchise

Status level	Qualifications	Experience
Non-tax agent (You do not hold current registration as a tax agent with the Tax Practitioners Board)	**Australian qualifications:** You have partially or fully completed your accounting diploma/degree. (If part of the way through your studies you will need to be prepared to complete all studies required by the Tax Practitioners Board within 3 years of joining us.) **Overseas qualifications:** If you hold an overseas accounting qualification you need to be already enrolled and in the process of studying to complete further Australian units as needed within 3 years of joining us. **Note:** All non-tax agents should visit www.tpb.gov.au/qas and check the units they require. This includes additional units for those who already hold a formal qualification as extra units are sometimes required.	**Accounting:** A minimum of 6 months of Australian or overseas accounting experience (private or public sector is recommended). If you don't have experience but you have had exposure to accounting or bookkeeping (e.g. you have done a bookkeeping course) then you can still apply for the franchise. **Tax:** Tax experience is not essential. You can learn tax in an apprenticeship-style manner on live work (your own cases) while under supervision, which is a franchise feature. Additional training options may also be considered based on need and benefit. See Learning tax. Base-level knowledge and learning styles vary.
Tax agent	Current registration with the Tax Practitioners Board.	Current registration with the Tax Practitioners Board.

II. Franchisee backgrounds

There are no hard and fast rules about a person's background.

Factoring in the criteria in the table above for qualifications and experience, some common backgrounds include:

1. Mature-aged students.
2. Anyone seeking a 'sea-change'. For example, we have franchisees who have previously worked in the hospitality industry, for the government, in finance, retail, sales, as payroll officers, etc.
3. Migrants with overseas accounting qualifications/experience.
4. Australian accountants seeking the benefits of our brand recognition and support systems.
5. Company accountants seeking to move into taxation and build their own public practice.
6. Bookkeepers who want to build a viable accounting and taxation practice and perform more challenging and higher-paid forms of work.
7. Tax preparers who would like the rewards of operating their own business instead of working as an employee – for example, H&R Block or ITP trainees.
8. Tax agents who seek the benefits of support, marketing, and business development assistance.

2. Non-tax agents – optional but recommended to achieve tax agent status within 3 years

Qualifications: Do I need to finish my studies within 3 years? Yes – you need to complete studies so you hold an appropriate qualification that is determined by the Tax Practitioners Board as being acceptable, so that when your experience levels are adequate you can apply for registration.

Experience: What happens if I have not met the experience requirements for tax agent status within 3 years? You will continue on the non-tax agent rate of 25% payable to the supervisor and will remain under supervision.

The benefit of achieving tax agent status is that this rate reduces to 12.5% and is eligible for further reductions to 10% and finally a capped rate. Tax agents also no longer require supervision and deal directly with the franchising division for support and assistance. Tax agents have more flexibility and can choose their own tax software, for example. There are definite incentives to grow your business and advance to tax agent level.

To understand our ongoing franchise fees see **SECTION D**.

To understand what is necessary for tax agent registration visit www.tpb.gov.au or see **SECTION I**.

3. Requirement to meet performance targets

Our franchisees are required to meet minimum performance targets (i.e. total fees excluding GST billed and collected for all Success Tax Professionals services).

See **SECTION B** for Success Tax Professionals services that franchisees must pay franchise fees on and that are included in the performance targets.

Minimum targets that need to be met (excluding GST) are:

$15,000 in year 1	$30,000 in year 2	$45,000 in year 3	$60,000 in year 4	$75,000 in year 5

1. **Why are there performance targets?** Performance targets keep franchisees active, consolidating skills, contributing to the brand and moving forward in their business. It is important to remember that after the first year, you already have clients who should become repeat clients in the second year plus refer new business to you. If you advertise and become involved in networking and other profile-raising activities this draws in new business on top of your existing business. This continues to happen each year providing you actively promote your business. Working from a good quality commercial office can help the process a lot.

2. **What happens if a performance target is not met?** Franchisees need to meet minimum targets or the franchise will cease unless the franchisee chooses to make a top-up payment and the franchisor agrees to this. Top-up payments are adjusted based on the % payable to the supervisor (by non-tax agents) or to the franchisor (by tax agents). Below are two examples of how this might work:

    - Non-tax agent with $10,000 of fees in year 1 pays the top-up payment of $5,000. They will receive 75% of the top-up payment back. They are on the 25%/75% fee split between supervisor/franchisee.

    - A tax agent with $10,000 of fees in year 1 pays the top-up payment of $5,000. They will receive 87.5% of the top-up payment back. They are on the 12.5%/87.5% fee split between franchisor/franchisee.

    To understand fee splits see the fees table in **SECTION D**.

3. **What might cause a franchisee not to achieve their target?** Most franchisees are keen to get started and take steps to advance their business towards being viable. Targets are never a problem for them as they continue to work their business proactively and exceed the targets easily.

   If a fee target is not met it is usually only in the first year and very infrequently in the second year. The reasons are usually due to being inactive or making poor decisions – e.g. failing to put time into the business, or being unrealistic and choosing to work from home when signage is not possible due to council restrictions and then also failing to use other advertising methods to compensate for this. Low exposure and/or low activity can result in low client numbers and therefore low client fees billed and collected. You need to be motivated and active. The ability to achieve targets largely relates to common sense.

4. **Using your client base to gain more business.** Once a business has momentum it typically gains expansion benefits due to referrals from your own client base. Each client can refer one or more clients and this is ongoing. Acknowledging and thanking existing clients, asking for their feedback, obtaining online reviews, communicating with newsletters and encouraging referrals can all lead to additional services from existing clients and new business from referred clients. Your existing clients are valuable 'advertisers' for your business.

5. **Evaluate if you are ready to start the business.** Franchisees should be active in operating their business within a short time of joining the group. It is wise to evaluate priorities, family and work commitments, finances and other factors that may delay starting this business, before applying. If your circumstances are not conducive to starting the business, defer your application and wait for a more appropriate time.

6. **Get help.** The franchising division assists franchisees in developing advertising campaigns. Be proactive in asking for guidance and help.

See **SECTION B** for how we assist in generating leads and facilitating practice growth.

4. Two years to be in a good quality commercial office and operating the business full-time.

I. The first two years

During the first two years, you can choose your method of operation – e.g. home-based (if the environment is suitable), mobile services or a variety of different types of office spaces. During this time you can also choose to be part-time.

(The sooner you transition to full-time and commercial premises, typically the faster your business will grow. If you are not a tax agent, you will have the opportunity to achieve status sooner and this means your ongoing franchise fees payable will be reduced.)

II. After two years

Running your practice full-time and from commercial premises with exposure is the most successful way to obtain good quality clients, a diverse range of work (including business clients and self managed super fund clients) and to showcase your business. Office signage is seen repeatedly by consumers and apart from purchasing clients is the most successful way to gain business. Office signage is a form of advertising that is highly reliable for obtaining results compared to all other forms of advertising. Office rent should also be viewed as advertising as it increases exposure – often dramatically. Good quality offices have many benefits.

This is why we set a two-year period in which to transition to full-time and a commercial office with quality.

Are there any exceptions to the two-year requirement? Yes – see the table below.

You need to be serious about being in practice and operating at commercial and reputable levels to get the best results.

Not all commercial spaces are equal and choosing the correct profile for an office will yield the best growth opportunities. Franchisees therefore discuss commercial spaces with the franchisor before entering into lease arrangements. This is also essential to ensure the suburb is available as a base location. You will be able to work within your budget.

FIRST TWO YEARS - SERVICING		
Type	**Purpose**	**Okay to use**
Commercial office – with quality features i.e. with exposure or other characteristics facilitating business growth – features may include visible signage, ground level, located in the correct demographic for customer interest and fee rates.	Ideal office for profile-raising and gaining attention. Visible signage acts as advertising.	From commencement onward.
Commercial office - general Serviced offices and general commercial spaces inside complexes or with reduced visibility. These require investment in other forms of advertising due to their lower profile and visibility.	Suitable for improving professionalism.	Up to 2 years (and may apply for an extension if performance targets are met. You must however be full-time after 2 years).
Home office	Okay for starting out, gaining confidence and while planning for commercial options.	Up to 2 years
Mobile services	Okay for starting out, gaining confidence and while planning for commercial options.	Up to 2 years
Casual mall leasing Seasonal pop-up unit in a shopping centre.	Not recommended due to cost, type of client, client losses and unpredictable nature of this type of servicing.	Not recommended
Remote Phone, video, email	Convenient for clients unable to be seen in person.	Offered by all franchisees regardless of office type as an add-on option.

FIRST TWO YEARS - HOURS	
Hours	**Requirement**
Part-time	Possible for up to 2 years only then must convert to full-time.
Full-time	Can commence as full-time or convert to full-time in the first two years.

5. Base location (advertised address) approval requirements

Approval is required for all base locations. This includes the starting location and any future locations due to moves. A base location is the address a franchisee will run their business from, service clients at, or use for advertising purposes as their address.

Approval must be obtained to prevent conflict of suburbs in use by franchisees. A good quality commercial office will be given priority to a suburb due to the franchisee's investment in rent and the office's profile-raising benefits for the brand and network.

6. Meeting professional development requirements

I. Non-tax agents - professional development (PD) minimum standards.

Our franchise requirements for professional development for non-tax agents are 40 hours annually of tax content and 20 hours of business development content. Franchisees can source content from a wide variety of formal courses they may be enrolled in, webinars, workshops, reading material, manuals and training events.

Franchisees can also attend our in-house workshops in Melbourne or Perth (these are discussed in **SECTION H**).

II. Tax agent professional development requirements.

Tax agents are required to meet professional development requirements set by the Tax Practitioners Board as a part of retaining their licence. Visit: www.tpb.gov.au

Tax agent franchisees can also attend our in-house workshops in Melbourne or Perth (see **SECTION H**).

7. Requirement to charge at least the minimum fees for services

Franchisees cannot set their own fees. The franchisor provides an updated minimum fees document to be used as the 'starting from' price for all services. This means franchisees can charge the minimum fee or above the minimum fee.

We do not target price-sensitive clients. Price-sensitive clients are constant bargain hunters who have no real idea as to the value of a service, nor the level of work involved or at times the risk involved. These clients shift between service providers, show little loyalty, are often problematic and destabilise a client base. Our franchisees aim for good quality clients.

See **SECTION B** and **SECTION F** to understand the types of work available and the nature of the work. You do not need to be desperate about clients who are price-sensitive. Avoid the mistake of dealing with these clients. This is called 'sacking the client'. Focus on quality clients.

D. FRANCHISE LOCATIONS | GRANT FEE | PAYMENT OPTIONS | FRANCHISE FEES

1. Where are our franchises available?

Success Tax Professionals franchises are available nationally in all areas of Australia. Tell us the suburb you wish to use as your base location (advertised address) and we will tell you if the address can be used.

You can find a list of our franchise practices and their locations on our website at www.stptax.com/contact/. This will show you the current geographic spread. There are no fixed territories for advertising or accepting clients from, but there are restrictions as to where a franchisee's base or advertised address for business can be. This is to prevent two commercial offices from being in the same suburb, for example. It also prevents home-based operators from clashing with commercial operators who have invested in rent and other commercial costs. Commercial operators with a good quality office are given priority over home-based, mobile services or lower-grade offices (such as serviced offices with no signage or exposure) for this reason.

2. What time of the year can I join?

You can join at any time of the year. There are no restrictions. The deciding factor is when it is the best time for you based on your ability to commit to getting started and focusing on the business.

3. The one-off grant fee to join

I. How much does the franchise cost to buy (grant fee)?

The standard grant fee is $15,000 including GST. See **SECTION B** for core services.

No. of people joining together to provide core service/s	No. of franchises required	Cost (incl GST) One-off purchase fee
1	1	$15,000
2	2	$15,000 x 2 = $30,000

Here are some examples of how the one-off purchase fee (grant fee) works:

Circumstances	Grant fee
One person buys the franchise and provides the core services.	$15,000
Husband (core and wife non-core services - e.g. administration, reception duties).	$15,000
Husband and wife (or a colleague/friend) both provide core services).	$30,000

Important:

- **Employing staff:** If you are a non-tax agent you cannot employ or engage any person to provide a core service. You can only do this when you are a tax agent. However, reception, marketing, administration, IT or non-technical support functions are not core functions and non-tax agents can engage others to assist in these areas if necessary.

II. Bundles (fee parcels) – you can add or transfer in a fee parcel of clients with your franchise:

- Client fee parcels in the general industry become available through brokers and privately when practice owners sell their practice or a portion of their practice.
- Client fee parcels within Success Tax Professionals become available at different times – e.g. retirement, leaving the industry, etc. In-house Fee Parcels
- All fee parcels must be branded or rebranded as Success Tax Professionals.
- You can read more about fee parcels here: Practice Acquisitions

III. Is the one-off purchase fee (grant fee) tax-deductible?

One-off cost	**$15,000**
Operators provide core services	*1 x person*
Franchise grant fee	$1
Training fees	$13,636
GST	$1364
TOTAL	**$15,000**

To clarify the grant fee and different variations, please send us an email if you have questions: stp@stptax.com. The above table is for a standard one-person providing core services franchise who is a non-tax agent on joining. Two non-tax agents joining would pay $15,000 x 2. The loan arrangement can also be used.

Depending on your circumstances, the training fees are usually tax-deductible. The GST is refundable if you are registered for GST.

See **SECTION B** for core services 'v' non-core services.

4. Two options for paying the franchise (grant fee)

The one-off franchise purchase fee (grant fee) requires either:

- Option 1: A one-off payment of the grant fee on settlement, or
- Option 2: By a loan arrangement of $5,000 on settlement. And then the balance over 10 monthly payments.

Grant fee (Example)	**Option 1** **In full on settlement**	**Option 2** **Loan with interest**	
$15,000	**$15,000**	$5,000 on settlement + $1,100 per month for the following 10 months	**$16,000**

5. Franchise fees (ongoing)

Ongoing fees are paid by franchisees based on actual work processed, billed and collected. There are no minimum payments. If for example, a franchisee has a month's holiday and no billings or collections for the month, they do not pay a minimum payment for that month.

The following fees are payable on service billings and collections (excluding GST):

NON-TAX AGENTS				
	PRE-TAX AGENT LEVEL			SPECIAL CONDITION
Services	**Must operate under Success Tax Professionals Brand**	**Can use own/other name**	**Fees to Tax Agent Incubator**	**Fees to Tax Agent Incubator (client base purchased/transferred in of $100,000/+)** Franchisee purchases/transfers across a fee parcel and either has or will finish studies for tax agent status within 12 months, otherwise fee payable reverts to 25%
Accounting/BAS/Bookkeeping	Yes	No	25%	12.5%
Tax	Yes	No	25%	12.5%
Tax planning	Yes	No	25%	12.5%

TAX AGENTS					
	TAX AGENT LEVEL				CAPPED RATE
Services	**Must operate under Success Tax Professionals Brand**	**Can use own/other name**	**Fees to Franchisor Turnover below $200,000**	**Fees to Franchisor Turnover $200,000/ +**	
Accounting/BAS/ Bookkeeping	Yes	No	12.5%	10%	Capped at a maximum $25,000 (excl GST) per financial year
Tax	Yes	No	12.5%	10%	
Tax planning	Yes	No	12.5%	10%	

See **SECTION B** for clarification regarding services. Accounting, bookkeeping, BAS, tax and tax planning cover a wide range of services, advice and consultancy.

E. FRANCHISE BENEFITS

1. Summary of benefits

	BENEFITS AND FEATURES	NON-TAX AGENT	TAX AGENT
1	**Low-cost franchise** of $15,000 (including GST) to join per franchisee, with possible tax-deductible benefits and refundable GST. The grant fee is a one-off payment. Pay on settlement or by using our loan arrangement with as little as $5,000 on settlement and the balance plus interest over 10 months.	Yes	Yes
2	**Reduced franchise fees payable based on agent status and volume:** 25%, 12.5%, 10% or capped rate of $25,000 pa. Becoming a tax agent and increasing your revenue reduces franchise fees payable yet franchise benefits continue.	Yes	Yes
3	**Wide choice of locations and the ability to relocate.** Contact the franchisor to confirm your preferred location is available.	Yes	Yes
4	**Flexible two-year period to convert to full-time and a commercial office.**	Yes	Yes
5	**Australia-wide territory** to advertise in and accept clients from. Regardless of your location you can accept clients from all areas/states and advertise for clients throughout Australia.	Yes	Yes
6	**Benefits of working with a credible franchisor with memberships and registrations**. • We've provided Success Tax Professionals franchises since 2003, • Australian Institute of Company Directors, • The National Tax and Accountants' Association (NTAA), • CPA Australia, • Registered Tax Agents, • Creators of TaxFitness software and training courses (for tax planning and business advisory) - www.taxfitness.com.au	Yes	Yes
7	**Supervision for non-tax agents providing tax services** Pairing with a supervisor who is a registered tax agent and who will provide mentoring, overseeing, technical support, one-to-one training, and delegation on tax services to meet Tax Practitioner Board requirements. Supervisors also provide authorisation to provide tax agent services to the non-tax agent under their licence. Non-tax agents need to comply with tax laws and franchise requirements to be provided with this benefit and privilege. (it is illegal to provide tax services and charge a fee for the services unless registered as a tax agent or authorised to act for a tax agent).	Yes	N/A
8	**Continuous technical support from head office with fast turnaround timeframes.** Support is provided by phone, email, remote log-in and video conferencing. Fast turnaround times – most assistance is immediate or within two hours. Ask your questions and get help.	Yes	Yes
9	**Training seminars are provided in Perth and Melbourne.** We provide our in-house seminars for franchisees twice a year in Melbourne and three times a year in Perth. These are 2-day workshops. They provide additional training to value-add to a franchisee's professional development.	Yes	Yes
10	**Access to our in-house community networking and support forum.** Our members help one another with technical questions, discuss ideas,	Yes	Yes

	BENEFITS AND FEATURES	NON-TAX AGENT	TAX AGENT
	sometimes form working relationships, look at office-sharing opportunities, and even discuss the co-purchasing of client fees for expansion. It is a very versatile, informative and helpful environment for learning and realising opportunities. You feel connected and supported by your franchisee colleagues which includes some 70 tax agents and additional experienced franchisees.		
11	**Access to our training library online.** An extensive library of manuals covering income tax basics, fringe benefits, super funds, tax changes and other industry material. We regularly add to the library.	Yes	Yes
12	**Induction and familiarisation programme for new franchisees.** Assistance with setting up, completing administration, assimilation into the network and ensuring an understanding of available resources, platforms and tools. This includes establishing the supervisory relationship with a tax agent supervisor for non-tax agents.	Yes	Yes
13	**Free issue of the first run of 1000 business cards** using an in-house approved template. This will give you your first set of cards to start marketing your services to contacts.	Yes	Yes
14	**Assistance to acquire tax agent registration.** We provide you with tools, training, supervision, growth opportunities, coaching, support and online advertising to help build your client base and work towards meeting the required experience levels necessary. Your supervisory tax agent (STA) can provide the required reference to validate the work you have completed.	Yes	N/A
15	**Tax software provided.** Non-tax agents use the software provided by their supervisor for the tax component of services, so it is compatible for lodgements. This is usually Xero or HandiTax. (Tax agents will have their own software and choice of product and pay for this based on group discounts or other concessions where applicable).	Yes	No
16	**Access to our marketing platform** with examples, templates and concepts for different promotional mediums. This includes access to various designs and product material that can be replicated or used as a guide. Examples include leaflets, permanent signage, moveable signage such as A-frames/corflute roster signs, posters, editorials, and advertisements. All advertising is required to be approved by us, so you can be confident that we will guide you and ensure that the material is legal, compliant and beneficial to what you are aiming to achieve. Marketing is a very misunderstood area and many dollars can be wasted if it is not done in a highly targeted way.	Yes	Yes
17	**Marketing advice and campaign development.** We will help you develop your marketing campaigns so they are results-oriented.	Yes	Yes
18	**Our online marketing will help generate leads for work:** We advertise the brand carefully and proactively. We constantly have campaigns and activities in place. We monitor results and vary the campaigns, mediums and content to optimise response rates. You can benefit from our digital marketing campaigns which stimulate public interest and can lead to work opportunities through calls, emails, messaging and online bookings directly linked to your practice. We set up a series of productive mediums online for your practice that will work effectively for you providing you respond to inquiries quickly. We will also help you use these mediums and keep them up to date.	Yes	Yes

	BENEFITS AND FEATURES	NON-TAX AGENT	TAX AGENT
	Our online marketing manager works with each franchisee. (Franchisor advertising significantly complements a franchisee's own approved local advertising. The two forms work together. To benefit from our advertising, you need to also advertise locally in your area to raise your profile and we will guide you in developing campaigns and material.)		
19	**CPA/IPA mentoring programme.** Mentoring is available. Joining a professional body is optional. (Completing tax agent studies is a priority.)	Yes	Yes
20	**Business development programmes and coaching:** • Tailored business support and advice for starting up. • Advice for advancing or transitioning options, (e.g. part-time to full-time, from home to a commercial office, or general best practices). • Expansion options to avoid wasting dollars on things that do not add value. • Performance target coaching to achieve and exceed targets.	Yes	Yes
21	**Advice and guidance for establishing a commercial environment** – including help in assessing office location (suburb and demographic evaluation). The design of compliant signage is completed in-house and in consultation with the franchisee. Franchisees are responsible for the cost of printing, and installing signage and can obtain quotes within their budget.	Yes	Yes
22	**Practice acquisitions (advice and guidance for buying fees).** This can be a 'wish list' option down the track if you have extra funds to invest in your business, have suitable skills for managing a fee parcel and if a parcel is for sale and you are competitive for those fees. Be realistic though – you need funds for this. A fee parcel of $200,000 for example, will often require at least 85% of that amount to be paid on settlement. It is, however, possible to discuss co-purchasing with another franchisee to share the cost. Sometimes smaller parcels (50,000 - $100,000) also become available.	Yes	Yes
23	**Potential to make up to $250 per hour** by providing quality value-added services and not just compliance services – for example, business advisory. Franchisees upskill over time and can learn new skills.	Yes	Yes
24	**Professional Indemnity Insurance** coverage for non-tax agents is provided under the supervisory tax agent's policy.	Yes	No
25	**Access to our Franchisee Resources Portal.** A living environment for our members of documents, forms, letters, tools and resources.	Yes	Yes
26	**Corporate stationery.** Brand your completed work and client communication with our products. Letterheads, with compliments slips, gloss folders, financial statement covers, tax organiser envelopes and more.	Yes	Yes
27	**Potential capital gain on future sale of the business** with our exit strategy which provides for 100% of sale proceeds to be awarded to the franchisee.	Yes	Yes
28	**Exit arrangements for franchisees wishing to leave pre-term.** Full details are in **SECTION G**.	Yes	Yes

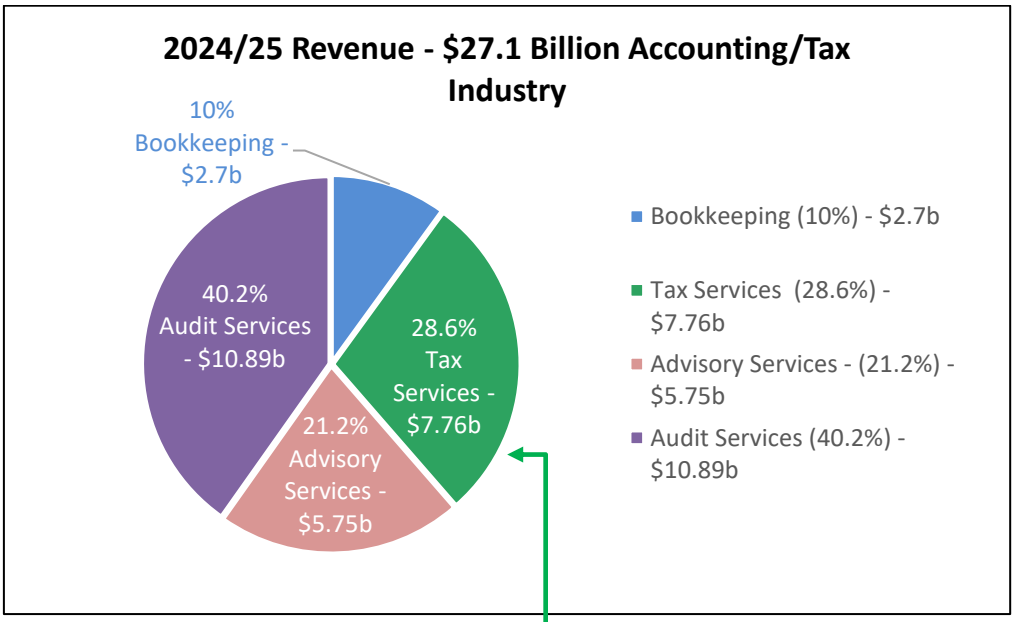
F. UNDERSTANDING THE INDUSTRY

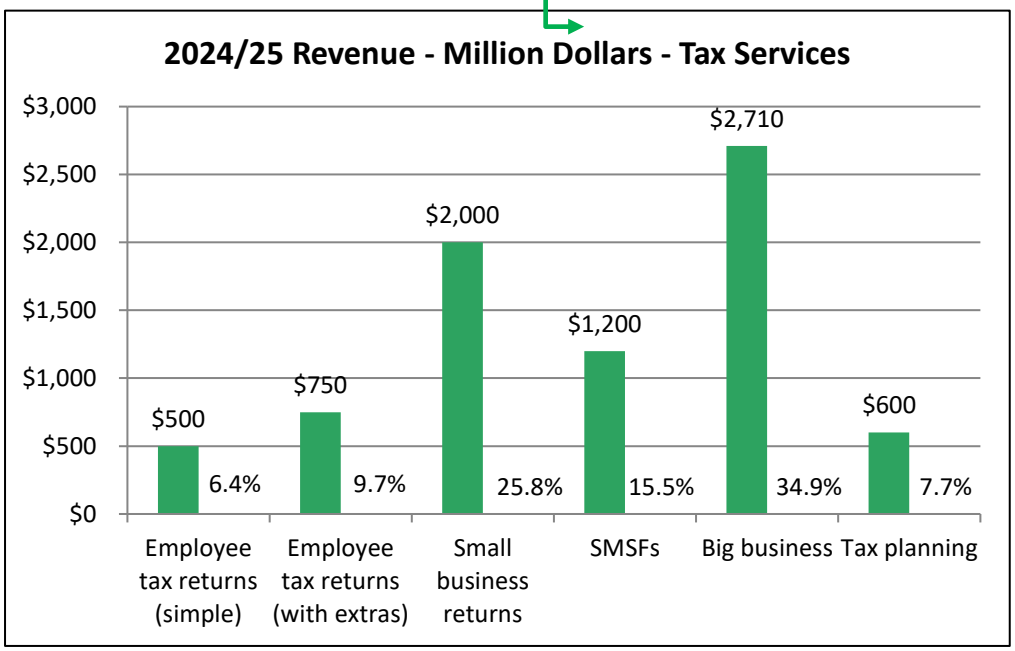
1. Available work

I. Work is available all year round — it is not seasonal

The chart below shows how large and diverse the industry is. Information is from the IBIS World Industry Report for 2024/25. When you hear of accountants talking about 'seasonal work' or work running out, it is typically because they only focus on, or limit their learning curve to being able to deliver services like bookkeeping, basic accounting and simple tax returns. Abundant work opportunities, however, exist in other categories. Our franchise practices can expand service offerings and therefore become fully occupied.

The following chart shows the Australian accounting industry break-up. There are 42,561 tax agents employing over 129,574 people in the industry.





This bar graph shows the break-up of the $7.76b of Tax Services (shown in green on the pie graph)

II. Who are our 'target market' clients?

Success Tax Professionals preferred clients require the following main professional services (however, note that within each category there are multiple sub-categories – for example, business advisory can have over 200 functions) – below is a broad guide:

- Individual taxation with extras (for example, rental properties, capital gains, personal services income and other circumstances requiring professional advice).
- Business taxation including accounts, tax and audit (partnerships, companies, trusts and self-managed super funds).
- Business advisory services (including asset protection, making business more profitable and valuable, and business management).
- Taxation planning.
- Self managed super funds (set-up, accounts, tax and audit) – Note: accountants wanting to provide any financial advice, including advice relating to SMSFs will need to hold an AFSL (Australian Financial Services Licence) or operate under an AFSL.
- Private ATO rulings.
- Business accounting.

Also, see **SECTION B** for Success Tax Professionals core services.



Make your clients more profitable – don't just tick a box and do compliance work. Making your clients more profitable adds value and increases the services they need from you and the fees payable for those services.

You don't need to decline work outside of your skill set while you're learning.

G. FRANCHISE TERM | LEAVING THE FRANCHISE

1. Franchise term

The franchise agreement is for a term of 10 years.

2. Options at the end of the franchise term

At the end of the 10-year term franchisees may choose to:

- Renew the franchise for $0 and receive a negotiated loyalty fee (reduced franchise fees payable) and continuity of ongoing support and franchise benefits, OR
- Leave the franchise as the term has been completed.
    - The established practice may be rebranded by the leaving franchisee and continue to be operated, OR
    - The practice may be sold if the franchisee wishes to realise their equity and the proceeds of sale retained by the exiting franchisee.

3. Requesting to leave the franchise before the end of the term

To leave before the end of the 10-year term franchisees need to choose one of the two options below:

Option 1:

1. Advise the franchisor and obtain agreement to leave, then
2. Advertise to sell the franchise and client base (client fees) to someone the franchisor determines to be suitable and who agrees to join the franchise and continue to operate those client fees under the terms of the franchise and brand.

   The leaving franchisee receives full proceeds from the sale of the franchise and fees (realises their equity) and the franchisor enters into a new working relationship with the franchisee who purchased the franchise and fees. (In some cases the fees may be purchased by an existing franchisee who wishes to expand their client base).

   Important: The leaving franchisee must comply with the terms of restraint.

   Terms of restraint preclude the leaving franchisee from operating as a business owner (or employee) involved in accounting/bookkeeping, tax or BAS services within a geographical range of kms and for a restraint period of up to 12 months. The exit clause can be read in detail in the contracts. It provides the purchaser with confidence the seller will not continue to trade or relocate the clients to their own advantage after sale.

Option 2:

1. Advise the franchisor and obtain agreement to leave, then
2. Enter into an exit agreement for the franchise pre-term whereby the client fees may be purchased for $75,000 + GST. The franchise will then end and the leaving franchisee may rebrand the practice fees and continue to trade as an independent.

H. TRAINING & SUPPORT | LEARNING

1. Support is ongoing and on-call as you need it

Success Tax Professionals provides franchisees with a wide range of ongoing support and training, plus business development guidance and assistance to work towards achieving a profitable accounting and taxation practice. We are serious about training and its impact on business development and overall success.

Some ways you can access support include:

- From a supervisory tax agent (STA): STAs provide dedicated one-to-one support for non-tax agents. Non-tax agents are guided, supported and trained by their supervisor who is a registered tax agent.
- From our head office training and support unit: Available to tax agents and non-tax agents with fast turnaround timeframes (immediately or within 2 hours during business hours). We use phone, email and video conferencing. Get help with technical questions, assessment of new office demographics, marketing, practice acquisitions (buying fees for expansion) and practice management.
- Our online Franchisee Resources Portal: A dedicated 'living documents' environment with forms, tools, checklists, letters, a marketing platform and a training library.
- Our networking forum with access to helpful support and guidance from our tax agent members and other experienced members with knowledge to answer your questions.
- Attend our workshops and webinars.
- Mentoring for CPA and IPA.

2. Minimum professional development requirements – non-tax agents & tax agents

- Non-tax agents need to meet our professional development requirements of 40 hours of tax and 20 hours of business development training annually.
- Tax agents need to meet requirements set by the Tax Practitioners Board of 120 hours of professional development per three-year anniversary of their registration. Visit: www.tpb.gov.au for more details about minimum hours per year and types of education considered suitable.
- All agents need to meet professional development requirements for any professional bodies they belong to – such as CPA and IPA.

Material to meet requirements can be sourced from a wide variety of available learning options – university courses, reading material, webinars, professional seminars, ATO releases, our in-house learning programmes, etc.

3. Seminars provided by the franchisor

The franchisor provides seminars in Melbourne (twice a year) and Perth (three times a year). Each seminar is a 2-day workshop from 9 am – 4 pm. Seminars are a combination of technical content, business development and networking.

Attendance is not compulsory. Those who do attend are however able to use the hours to assist in meeting professional development requirements as shown above.

Franchisees are welcome to attend the social get-togethers following the seminars which include social networking, end-of-day drinks and annually a dinner or lunch paid for by the franchisor.

4. Induction

Franchisees can start at any time of the year. The ability to obtain work is not seasonal for our franchise. Induction is a one-to-one process and therefore is arranged to match a franchisee's commencement.

5. No (or limited) tax knowledge when starting

Tax experience is not essential.

See **SECTION C** for qualifications and experience. We recommend that you have some basic accounting experience (either private or public sector) so that you can manage basic accounting tasks. Comprehensive courses may also cover this.

Tax, however, can be learned over time in an apprenticeship-style way with support from a supervisor and the training unit at head office. You can add to this by using additional resources while running your business at the same time and generating income. Visit our website for suggested ways to advance your capabilities in the field of taxation: See Learning Tax. The H&R Block course is a very good option for beginners.

In this way, you learn and practice skills on live work with help so you reinforce and consolidate what you learn and make money at the same time.

6. CPA and IPA mentoring

We can connect you with a mentor from within our network for CPA, and IPA mentoring programmes. (Professional body memberships are optional and not compulsory at either non-tax agent or tax agent level). Tax agent studies are the priority over CPA, IPA or CA.

I. REGISTERED TAX AGENT STATUS

1. Joining us with non-tax agent status

Non-tax agents and tax agents can join Success Tax Professionals.

Non-tax agent franchisees can work towards achieving tax agent status by completing their studies (required units) and at the same time acquire practical experience through their Success Tax Professionals' business activities. This means completing the different types of tax work necessary and in sufficient quantities on a full-time basis.

This can circumvent the need to finish studies and work for a tax agent as an employee until the required experience is obtained. Our franchisees can be studying and building a business asset at the same time.

Our supervisory infrastructure incorporates our Tax Agent Incubator Programme (TAIP), which matches non-tax agents with a supervisory tax agent who will oversee their development, provide technical support and delegate on tax work. Not all services under our franchise require supervision. Tax services, however, do.

2. Achieving tax agent status

Non-tax agents need to finish studies to meet registration requirements within three years of joining us and will remain on the non-tax agent fee rate of 25% until status is achieved. See fee information in SECTION D.

Tax Agent Status = Qualifications + Experience: Although there are a number of categories, the most common criteria for achieving tax agent status is to hold the required formal qualifications plus sufficient full-time (12 months for a degree/24 months for a diploma) demonstrated tax related work experience under a tax agent. This also means having enough variety in the work completed (individuals, partnerships, companies, and trusts).

Qualifications: Check your qualifications with the Tax Practitioners Board – never assume they are okay. Extra tax and/or law units are very commonly needed. https://www.tpb.gov.au/qas/

Experience: How quickly you will achieve the 12/24 months of full-time tax-related work levels, amount and variety of work necessary depends on what you do in addition to the franchisor's efforts to generate leads for your practice - see **SECTION B** for what we do.

Also, visit https://www.tpb.gov.au/ and search for 'relevant experience for tax agents'.

Factors we know that help to build the necessary work experience levels:

- Being full-time.
- A commercial office on ground level, with visible signage and in a location with repeat traffic (vehicle and foot) that is in the right type of area (for example retail or office zoning and not industrial).
- The base location (your advertised address) is not in a price-sensitive area where potential customers are struggling or not wanting to pay for quality services. If you see accountants advertising cheap tax returns and services, you are in the wrong area.
- Joining networking groups, for example, business groups, and the local Chamber of Commerce (or similar) to interact with business owners.
- Advertising with targeted material (key messages of interest) to specific target markets that have a need or benefit generated from various services. (Relevance matters. Selling benefits matters.)
- Responding to inquiries and leads either from franchisor initiatives or from your own promotional efforts in a professional way with fast response times. Delays lead to lost opportunities.

- Using an online booking system that you manage efficiently. We'll help you with this.
- Obtaining client testimonials. Encourage your happy customers to advocate for your business.
- Upselling beneficial services to add value, increase fees and work types – expanding services to include consultancy services (tax planning, business advisory and benchmarking). Nearly all accountants are surprised when they find out what these services REALLY are compared to what they think they are.
- Communicate with clients on a more regular basis – newsletters, reminder letters, and feedback surveys. Keep clients in the loop and across benefits and changes that can initiate more work.

Summary from the Tax Practitioners Board website regarding tax experience requirements.

Regulation item	Educational qualification (if any)	Amount of relevant experience
201	Tertiary qualifications in accounting	Equivalent of 12 months full-time in the past 5 years
202	Tertiary qualifications in a discipline other than accounting	Equivalent of 12 months full-time in the past 5 years
203	Diploma or higher award in accounting	Equivalent of 2 years full-time in the past 5 years
204	Tertiary qualifications in law	Equivalent of 12 months full-time in the past 5 years
205	Work experience	Equivalent of 8 years full-time in the past 10 years
206	Membership of a professional association	Equivalent of 8 years full-time in the past 10 years

3. Tax agents in the Success Tax Professionals network

Since 2003 we have been facilitating the journey to tax agent status for our non-tax agent members. We have helped some 300 franchisees over the years to reach this goal.

It is important to understand that tax agent status is part of the journey but not all of the journey. The point of a Success Tax Professionals franchise is to create a profitable business that will continue to grow and in a dynamic way.

There are very limited benefits in holding a piece of paper that says tax agent or CPA, for example, unless you can make a very good living out of it. Having opportunities such as being able to learn new skills, receive support and manage more complex work establishes a very solid foundation from which to grow.

J. EQUIPMENT

1. Equipment needs, software and vision

Non-tax agents: Accounting and tax preparation software (HandiSoft or Xero depending on what is in use by the non-tax agent's supervisor) is included at no extra cost during the non-tax agent period.

Tax agents: May use HandiSoft, Xero or comparable products and are responsible for the cost.

Other items you will need to consider:

- Computer, printer, phone, internet, scanner, (other basic office equipment).
- Speakers, microphone and camera either built into the computer or added on (e.g. to use Zoom video conferencing for support, and for webinar participation).
- Additional software if needed – e.g. MYOB, secure e-sign software subscription.
- Merchant facilities.
- Working capital for advertising, stationery, etc.
- Suitable commercial office within two years of commencement.
- Ability to work on the business full-time within two years.
- Public liability insurance (especially for commercial offices). Professional indemnity (PI) insurance is covered for non-tax agents. Tax agents require their own PI coverage.

2. Revenue targets 'v' performance targets

I. The difference between revenue targets and performance targets.

Whereas performance targets are the targets you need to meet to keep the franchise, revenue targets are designed to give you an idea of what we believe are achievable revenues as a guide to understanding the industry. You need to meet performance targets (which are lower than revenue targets). You do not need to meet revenue targets.

Minimum performance targets excluding GST:

$15,000 in year 1	$30,000 in year 2	$45,000 in year 3	$60,000 in year 4	$75,000 in year 5

II. Revenue targets for the first year.

The performance target for the first year is $15,000 minimum excluding GST, whereas revenue targets are:

- $20,000 to $40,000 if operating part-time.
- $40,000 to $60,000 if operating full-time from commercial premises.
- $100,000 to $150,000 if purchasing fees and operating full-time from commercial premises.

The ten-year target is revenue of $500,000.

K. GALLERY

1. Seminars and networking







Photos: Training seminars in Melbourne, VIC

Venues	Location
Perth	Quest East Perth, 176 Adelaide Tce, Perth WA 6000
Melbourne	Adina Hotel, 189 Queen Street, Melbourne VIC 3000

End of year functions, Melbourne Crown and Perth Crown



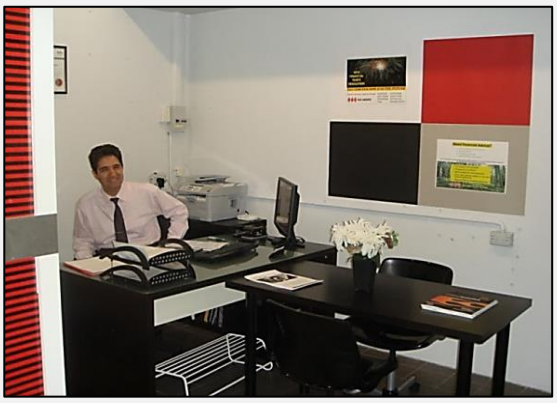




Perth WA franchisees at the Crown Casino for their end of year function.

2. Success Tax Professionals commercial offices - examples











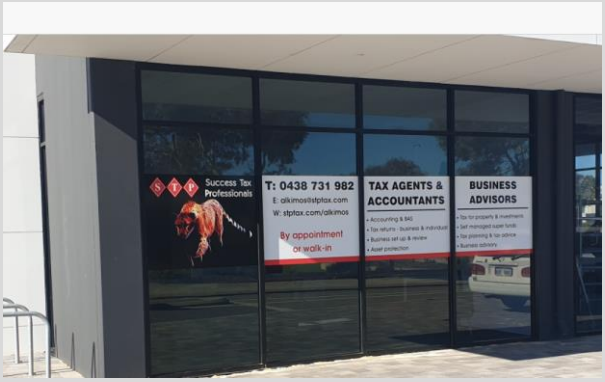
















You can work from home for up to 2 years. You can also be part-time for up to 2 years. After this you need to be full-time and in a good quality commercial office. It makes a big difference to the type of client you attract, your ability to charge good fees, the amount of work you receive, and the customer's perception of your business. For non-tax agents it also facilitates getting to tax agent status. Good quality offices are packed with beneficial features.

Want results faster? Move to approved commercial premises and full-time hours sooner.

3. Home-based and mobile services - examples

Home-based and/or mobile services are options for up to 2 years after joining. It is important to have realistic expectations and be prepared to advertise extensively as neither home-based nor mobile services present the same opportunities as commercial offices with good exposure factors.

Home-based options will also be restricted by council requirements whereby signage of any description will usually require approval and may not be permitted at all within certain residential areas. If permitted, it will be restricted to a certain size – for example, one square metre or less.



VICTORIA home-based office with A-frame (possible subject to council approval)



QUEENSLAND (mobile services car signage)

Car signage does not help gain clients on its own. Its main use is to link other signage together – e.g. office and car, Home signage/A-frame and car. In other words, it is weak signage on its own.

L. FREQUENTLY ASKED QUESTIONS

1. **Will I be able to advertise my business?**
   Yes, we encourage advertising and have an approval process that needs to be followed to keep all marketing brand-compliant and legal. (Some mediums cannot be used by non-tax agents and these include websites and social media.) No franchisee actually needs a website because our official site is a well-established site of authority online and all franchisees receive a customised landing page that can be tailored for their practice within our site. We've done the work for you. Likewise with our Facebook page.

   You can also find out what the franchisor does in **SECTION B**.

2. **Can I have more than one office?**
   Yes. However, this is not recommended until tax agent level and when a practice owner can effectively manage staff with controls, monitoring and systems. In nearly all cases the best results are obtained by having one well-managed high-performing office that can be controlled.

3. **As a non-tax agent can I choose my supervisor?**
   This may be possible but cannot be guaranteed as it also depends on a supervisor's availability and the number of franchisees they already have under supervision. Options can be discussed.

4. **I would like to talk to some franchisees. When can I do this?**
   Franchisees have work commitments as they are operating practices. If you complete our Advanced Inquiry Form we will be able to connect you with available franchisees who are willing to share their experiences and have time. You will also have access to further information and content from us. You won't be committing to buying a franchise by completing the form.

5. **Is work seasonal?**
   No, it isn't. Our franchise is packed with services that can be offered to the public – see **SECTION B** and **SECTION F**.

6. **How many franchisees and tax agents are in Success Tax Professionals?**
   We've created over 300 tax agents since 2003. In July 2025 there are 80 franchisees and of the current group, 70 are now tax agents. Some franchisees also have staff who they have successfully taken on the journey to tax agent level as well. Our very first franchisee is still with us after more than 20 years.

7. **Can I employ staff?**
   At tax agent level you can employ staff to perform duties as required because you will be fully responsible for them. As a non-tax agent, you can only employ staff if you need to for non-technical functions (e.g. administrative). You cannot employ staff to provide any Success Tax Professionals core services.

8. **Are the best offices in shopping centres?**
   No. The best offices are out on the street at ground level with highly visible signage and exposure to the right demographic (not price-sensitive customers).

9. **Can I use my own name or brand?**
   No.

10. **Can I leave the franchise?**
    Yes, but there are terms to comply with and these can be read in **SECTION G**.

11. **Is mentoring for professional bodies such as CPA and IPA possible?**
    Yes.

M. MORE INFORMATION & APPLYING

1. Clarification or general questions

Phone 08 9337 4440, 9 am – 5 pm AWST (we are in Perth, WA). Or email your questions to Tracy James (Franchisee Development Director) at stp@stptax.com. Mob: 0402 053 821.

2. Serious interest in the franchise? Proceed to the next stage of inquiry

To receive access to the next level of official information before considering contracts you will need to complete the Advanced Inquiry Form which includes a confidentiality deed.

This will provide you with access to special material such as our minimum fees document for charging clients and connection to available franchisees to discuss their experiences as a franchisee. Franchisees do not however share financial information as this is private and has no bearing on the performance of another franchisee. Performance is a very individual outcome and result.

3. Applying – the final stage of inquiry

1. Make sure you have already completed an Advanced Inquiry Form and received the information in 2. above.

2. Send us an email and ask for contracts to be emailed to you. (If you change your mind you do not need to sign these). They cannot be signed for a minimum of 14 days from when you receive them. You may take them to a person of your choice including a franchise solicitor if you want to.

   The franchise must be purchased by a company or trust structure (not as an individual). If you need help contact us. The entity must also be registered for GST.

3. Sign and return by email the required documents after the minimum 14-day waiting period has passed and make the required payment either in full or using the loan arrangement.

4. You will receive a final copy of the counter-signed documents from the franchisor by email.

5. A 14-day cooling-off period then commences. If you change your mind during this time contracts can be cancelled and any money paid will be refunded in full.

6. Induction commences after the cooling-off period. Then you're on your way and can access our franchise features!

