

# CLIENT PEACE OF MIND (PoM) STRUCTURE SWOT ANALYSIS SERVICE

## the BACKGROUND

The genesis of the Koustas & Co Client PoM Structure SWOT (i.e. Strengths, Weaknesses, Opportunities and Threats) Analysis service was the Koustas & Co accountants' shared experiences—gathered over many years—in providing valuation and expert witness services in family law matters. After observing the often misunderstood and arbitrary manner in which lawyers investigated and dealt with the financial elements of a family law matter, a need was identified to provide legal practitioners with a structured format identifying the specific accounting and tax issues that are often in play but rarely countenanced.

## the NEED

In the same way that accountants make lousy lawyers, so to do lawyers generally make less than outstanding accountants. In recognising that each profession is rarely good at 'crossing-over'—Koustas & Co have developed a simple, yet effective service designed to provide family law practitioners and their clients with a roadmap highlighting the particular accounting and tax issues needing to be dealt with during the separation process. As the statutory and common law environments relating to tax become more and more complex, rarely are the 'real world' client issues any less so. With this in mind, the Koustas & Co Client PoM Structure SWOT Analysis service is designed to provide the necessary financial information that the family law practitioner can then use to more effectively and efficiently represent their client.

## the SERVICE

The Koustas & Co Client PoM Structure SWOT Analysis is designed to provide the family law practitioner peace of mind that their client's (and other interested parties) financial affairs are scrutinised to the extent that any potential issues—that may be cause for concern—are quickly identified.

The key assets (including the increasingly problematic cryptocurrencies) and liabilities in the family law settlement pool are contemplated—together with a review of any structures (i.e. companies, trusts, partnerships) that may be in existence and the implications of those elements upon the later drafting of family law orders.

There are four options for a fixed price agreement to suit the needs of the family law practitioner and their clients:

### OPTION 1

Client PoM  
SWOT Analysis  
presentation  
(soft copy)

**\$1,500 + GST**

### OPTION 2

Everything in  
Option 1, plus 1  
hour meeting to  
present findings  
and answer  
questions

**\$2,000 + GST**

### OPTION 3

Everything in Option 2,  
plus liaising with existing  
accountant (and/or  
other advisors)

**\$2,500 + GST**

### OPTION 4

Everything in Option 3, plus additional work such  
as detailed income tax planning and calculations;  
retirement planning and calculations; succession  
planning and modelling or a complete financial  
due diligence and associated advice as to how  
best draft orders to ensure that tax efficiency  
upon division of the assets is achieved.

**P.O.A**

*Given the large asset values at stake during a separation—not to mention the consequences of not knowing the 'whole truth'—the question a family law practitioner should ask oneself is not 'why should I use this service?' rather, 'why wouldn't I?'*



**KOUSTAS+CO**  
CHARTERED ACCOUNTANTS

## Contact us

...to learn more about how we can provide you with expert financial support and a structural review, contact Matthew, our Business + Practice Development Manager.

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