QUICK REFERENCE GUIDE FOR BROKERS

WHAT TO ASK YOUR CLIENT WHEN TAX DEBT ENTERS THE CONVERSATION

1	2	3	4
Is there existing ATO debt?	Are they in a payment plan?	Is the plan sustainable?	Any DPNs, garnishees or credit listings?
No → proceed normally	**Yes → go to step 3**	**Yes → bulletproof**	**No → monitor closely**
Yes → go to step 2	**No → refer now**	**No → renegotiate**	**Yes → urgent referral**

RED FLAGS TO LISTEN FOR

- "We've been getting letters from the ATO…"
- "We had a plan but it fell over."
- "Our accountant is handling it."
- "We got a Director Penalty Notice."
- "The ATO took money straight from our account."
- "We owe some GST / PAYG / super…"

IF LEFT UNADDRESSED, EXPECT

- Credit default listing with the ATO
- Director Penalty Notices (personal liability)
- Garnishee notices on bank accounts
- Forced liquidation

WHY PARTNER WITH TAX ASSURE

- **Australia's leading tax debt negotiation firm.** 12+ years operating exclusively in ATO tax debt negotiation
- Supporting **thousands of Australian businesses** to resolve ATO debt
- **Completely independent.** No conflicts. No challenge to existing advisors

WHAT TAX ASSURE DOES

1. **Halt** all ATO recovery action immediately
2. **Negotiate** a sustainable payment plan aligned with real cash flow
3. **Recover** interest & penalties — typically 20–70%+ of the total debt
4. **Manage** all negotiations directly with the ATO

HOW TO REFER — IT'S SIMPLE

1. Contact us with: client name, ATO debt amount, and funding stage
2. We conduct a full ATO review at no cost and provide a clear recommendation
3. Fixed fee for negotiation · success-based for remission · agreed upfront
4. We pay commissions for referrals — including clients you can't assist yourself

GET IN TOUCH

Olga Koskie, CEO & Director
olga.koskie@taxassure.com.au

Michael Moon, Principal & Director
michael.moon@taxassure.com.au

Wendi Dawson, Growth & Partnerships
wendi.dawson@taxassure.com.au

1300 952 295
taxassure.com.au

TaxAssure