

GUIDE TO SCHEDULE 1B

EXPORT EXPENSES – MARKETING CONSULTANTS

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GUIDE TO WHAT YOU CAN CLAIM

A marketing consultant is a person independent of you and at arm's length to your business, who is engaged to carry out specific export market research or export promotion activities for you. You may claim all reasonable expenses incurred to employ a consultant to undertake a project for you, such as the cost of:

- the consultant's fees
- advertising or publicity done by the consultant on your behalf
- export planning work where the plan includes marketing and marketing research strategies
- research and analysis of an export market

- fares, accommodation, meals and entertainment costs incurred by the consultant to promote your product or to solicit export for you.

Expenses under the marketing consultant's category are capped at A\$50,000 per application. However, to ensure you receive maximum benefit from this category, you should list all the eligible expenses.

You cannot claim the cost of:

- success fees or sales commission paid to the consultant
- capital items used by the consultant to do the project for you
- export finance advice or assistance to prepare your EMDG application

- services to enable you to meet overseas quality accreditation standards
- product development or testing
- after-sales service
- 'off-the-shelf' material where the applicant is not paying for work to be undertaken by the consultant.

GUIDE TO WHAT YOU NEED TO PROVIDE ON THIS SCHEDULE

Complete a schedule for each marketing consultant. Make sure all contact details on the schedule are completed.



Australian Government
Austrade



- Please make sure that the address you provide for your representative is their actual address (primary place of business) rather than a 'registered' or serviced' office.
- If there is a change in your representatives contact details after you have lodged your application please contact Austrade and notify us of the change.

Period of Consultancy

State the dates the consultant was employed by you (for example: 1 March 2018 to 1 November 2019).

Relationship to Applicant

State the consultant's relationship to you (i.e. whether independent or not).

Note: The following relationships are not considered to be 'independent' to the applicant – director to the applicant, shareholder of applicant, employee or de-facto employee of applicant, associated company, beneficiary or trustee of a trust estate, relatives of the applicant, shareholders and directors.

In determining whether or not a claimed consultant is independent of you, Austrade will apply specific [Ministerial guidelines](#).

Describe your consultant's activities

Describe the activity undertaken by the consultant, such as:

- introduction to potential buyers
- report on the countries market

Expense Item

List the expense items (for example: airfare, retainer)

Country

State the country of your marketing consultant.

Supporting Evidence

Detail the evidence you have to substantiate the expense claimed, such as invoices, agreement, or reports.

Austrade will also need you to demonstrate:

- the existence of an agreement between you and the consultant, e.g. a copy of a commercially acceptable contract of appointment
- evidence that the consultant has carried out the activities e.g. written reports.

Payment Details

The date of payment for expenses must be during the grant year (or for first-time applicants, the grant year and the previous year).

- Date of payment: give the date on which the expenses were acquitted. For payment by cheque, payment order or credit card, give the

date your bank or financial institution or credit card was debited

- Payment method: state how the expense was acquitted by the applicant e.g. cheque, bank transfer etc.

Please note: the descriptions below are the only ones you can use on the online application form:

- Amex
- BPay
- Cash
- Cheque
- Contra
- Diners Club
- Direct Debit
- EFT (electronic funds transfer)
- Journal
- MasterCard
- Offset
- PayPal
- T/T (telegraphic transfer)
- Visa
- Other.

Total Amount (Whole Australian dollars) Total Retainer/Expenses

State the amount claimed in whole Australian dollars in the Total Fees or Total Expenses columns. In the '% claimed' columns, state as a percentage the proportion of your consultant's time that was spent on activities relating to the promotion of the eligible products you are seeking to export. This will automatically be used to calculate the claimed retainer and claimed expenses. You must be able to demonstrate the basis of the apportionment.