

UNCOVER  
A WORLD OF  
ACCOUNTING  
WITH EFFECTIVE  
STRATEGY AND  
REAL ADVICE





# ACCOUNTING. STRATEGY. ADVICE.

Having an accountant that is experienced, knowledgeable and that you can trust is essential. These principles guided the establishment of PT Partners in 1998 and since then, we have delivered a truly exceptional client service experience.

We are a four director firm supported by a team of enthusiastic, qualified accountants. We offer the vast industry experience and expertise that you would expect from a large firm, but with the personal touch of a smaller firm.

Our clients come from all walks of life, but have one thing in common – the peace of mind that they are in the best possible hands.

## New to Business

Going into business for the first time can be daunting. Taking the wrong path could have major implications for a new business venture. PT Partners can provide you with much needed advice and support through this difficult process. Whether it is guiding you on your tax and GST obligations, advising you on the right trading structure, or providing you with further perspectives on your business decision, we are here to help.

## Already in Business

If you are already in business, and either don't have an accountant or would like to consider a change, then let's talk. We can work with you to ensure that your tax outcome is optimised and your trading structure is right. We can look at your business from different angles and help you to improve your outcomes and achieve your goals.

## Working, Investing or Retiring

If you are working as an employee or contractor, we can look after your tax obligations and ensure your tax position is optimised. If you are investing, or thinking about investing, we can assist you with your decision making and provide expert advice on the tax consequences. If you are retiring, or thinking about retirement, we can offer specialist expertise on retirement strategies and superannuation. If you have a self-managed super fund, or would like to consider one, we can take care of that too.



# THE PT PARTNERS DIFFERENCE

Not all accounting firms are the same. There are a number of things which set us apart and enable us to provide an outstanding client experience.

## We're not too big and not too small

Firms that are too small can find it challenging to deliver clients everything they need. Firms that are too big can struggle to deliver clients a valued personal relationship. Our firm is large enough to offer a complete range of services, yet small enough to retain a personalised approach.

## We listen and we make sure we get to know you

We take the time. We make sure that we understand your circumstances and your goals. We care about delivering to you the highest standard of service and have a team of great people who want to meet and work with you.

## We consider all angles

Tax and accounting advice is not always black and white. It is important to have an advisor that can think laterally and consider all possibilities. We pride ourselves on innovative thinking.

## We stay on the cutting-edge

The world of tax and accounting never stands still for long. The laws are constantly changing. We devote a large amount of resources to staff training and staying abreast of technical developments. We make sure we're across the things that affect you.

## We cover all bases

In addition to your tax and accounting requirements, we also like to ensure the rest of your financial affairs are in order - areas like superannuation, financial planning, insurance, wills and estate planning. We have a trusted network of professional advisors that can work with us to meet your needs.

## We know small business

The skill set of our team, our resources and the size of our firm allow us to deliver a very effective service to the small-to-medium enterprise (SME) market. It is a sector of the business landscape where we can make a very real difference.

## We stay connected with you

We understand that many of our clients want more than just a "once a year" accountant. We stay connected with you throughout the year through emails and various other mediums.

## We utilise great technology that benefits you

We have a secure portal inside the Client Zone of our web site that gives you access to your important documents whenever you need them, and provides a platform for us to collaborate with you and your other professional advisors.

## Our first meeting is "off the clock"

An initial meeting is as much about you getting to know us, as it is about us getting to know you. Your first meeting with us is a chance for us to understand your specific circumstances and explain how we can help. It is free-of-charge and without obligation.





# OUR SERVICES

## Compliance

Compliance is the “red tape” that comes with running a business. Staying on top of it can be a constant challenge.

Compliance, however, is a very important aspect of your business to get right. Financial reporting provides the basis for your big decisions. To this end, we can help you to adopt sound recordkeeping practices and, where appropriate, assist you in sourcing a qualified bookkeeper to support this important function.

At PT Partners, we manage the compliance function by informing you of the tax changes that affect you, keeping you abreast of when your returns are due, and by providing you with the level of assistance that you need. Above all else, we strive to deliver real value to the compliance function by minimising your tax costs. We are proactive and innovative.

### **Our Compliance Services include:**

- Financial statements
- Tax returns
- Business Activity Statements
- Fringe Benefits Tax returns
- ASIC and company filings

## Tax Consulting

Tax is often the single biggest expense in one’s life. Getting the right advice can make an enormous difference, whether it be an important one-off transaction or a long-term investment.

At PT Partners, we bring to the table vast industry experience and expertise. We stay at the forefront of change and are able to deliver you clear advice and cutting-edge strategies.

### **Our Tax Consulting Services include:**

- Tax planning
- Capital Gains Tax strategies, including purchase and sale of businesses
- GST advice
- International tax advice
- Advising on Trust Deeds and Trust Distribution Resolutions
- Negotiation of payment arrangements and interest remissions with the ATO

## Structuring & Restructuring

Having the right trading structure is crucial on so many levels. Income tax effectiveness, capital gains tax effectiveness, asset protection, liability and succession planning are all key considerations.

At PT Partners, we work with you to make sure that your trading structure ticks all of the boxes. If you are new to business, we take the hassle out of the process by also attending to all of the necessary government registrations. If you are already in business, we can look at your existing trading structure and, in many cases, make changes for the better.

### **Our Structuring & Restructuring Services include:**

- Establishment of companies, discretionary trusts, unit trusts and self-managed super funds (SMSFs)
- Re-examination of existing trading structures
- ATO and ASIC registrations
- Strategies to move assets (including businesses) from one structure to another
- Facilitation of legal agreements

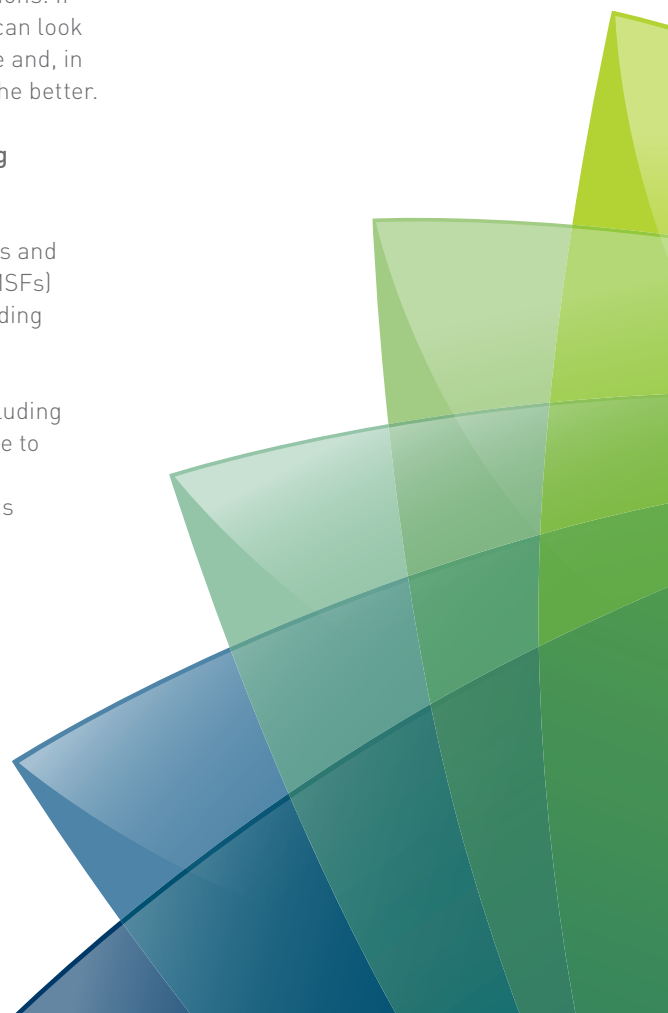
## Business Consulting

It can be difficult when running a small-to-medium business to think of everything yourself. That’s why having a knowledgeable and trusted advisor is so critical.

At PT Partners, we have the skills and insights to help you see and think of issues that you may not otherwise have considered. We can offer you an external perspective on elements of your business, and work with you or your management team to make changes for the better.

### **Our Business Consulting Services include:**

- Cash flows, forecasts and budgets
- Benchmarking
- Business Valuations
- Key Performance Indicators
- Working with banks and financiers
- Shareholder agreements and buy-sell agreements
- Succession planning



## Accounting Software

The choice of accounting software, and how you use it, will have a big influence on the quality of your records when it comes to tax time. It will also influence the quality of information that you have at your fingertips throughout the year to manage and analyse your business.

At PT Partners, we take the guess work out of the equation by professionally advising you on what you need.

### **Our Accounting Software Services include:**

- Advice on choice of accounting software
- Purchase of software
- Assistance with implementation and set-up
- Assistance with sourcing a qualified bookkeeper
- Briefing the chosen bookkeeper on your specific requirements.

## Audits & Reviews

Audits are an unfortunate but inevitable part of doing business. Audits can come in many forms - Income Tax, GST, and Superannuation, to name a few. When an audit does arise, having expert representation is vital.

At PT Partners, we can help you navigate the complex and unnerving experience that is a government audit, ensuring that your rights are protected and that you mount the best possible defence.

### **Our Audit & Review Services include:**

- Representation in Taxation Disputes and Audits
- Audits of Solicitor and Real Estate Trust Accounts
- Building Services Authority Reviews & Licensing/Renewal Applications
- Tax Audit Insurance to pay for your professional fees in the event of an auditor review.

## Self-Managed Super & Retirement Planning

Superannuation and retirement planning are key elements to your financial plans, regardless of your age.

At PT Partners, we have specialists who can meet with you to discuss your objectives in retirement, and work with you to create an effective strategy to achieve these objectives.

### **Our Superannuation & Retirement Planning services include:**

- Review of your retirement objectives
- Strategies to maximise retirement income
- Establishment of Self-Managed Superannuation Funds (SMSFs)
- Advice regarding borrowing within your SMSF, and establishment of structure
- Preparation of SMSF Annual Accounts & Income Tax Returns
- SMSF Audits
- Establishment and ongoing administration of SMSF pensions

## Advisor Network

At PT Partners, we see ourselves as the hub of our client's financial affairs.

For this reason, we have surrounded ourselves with a network of experienced and trusted advisors who, between them, provide:

- Financial planning & investment
- Insurance
- Mortgage Broking
- Wills & Estate Planning
- Commercial Law
- Quantity Surveying
- Property valuation & sourcing

We will help you to identify when you require the services of our advisor network. We'll make the introduction and brief the advisor on your behalf. We'll participate in the process wherever we can be of assistance.

# OUR DIRECTORS

## Kelvin Deer CPA

Being involved in a progressive and innovative accounting firm that's continually seeking efficient and effective solutions for its clients is what drives Kelvin's passion for this industry, this firm and the team here at PT Partners.

Kelvin also has a number of clients in the manufacturing sector and works closely with this industry group, assisting clients to focus on their financial benchmarks and goals.

When not actively working with clients, Kelvin also has a heavy involvement in the production of a national taxation based publication which PT Partners authors.

Kelvin is a Tax Agent and Certified Practising Accountant and holds a Bachelor of Business (Accountancy).

## Darren Hagarty Chartered Accountant

Darren's passion is meeting new clients and making a real difference in their financial affairs. While a significant focus of Darren's client work is on small to medium enterprises and private business owners, he also enjoys working with individuals and retirees.

Since becoming a director in 2004, Darren has developed particular expertise in complex tax planning, structuring and re-structuring, and estate planning. Darren sets the direction of the firm's information technology platforms, including our web site, and has a keen interest in improving the way in which we connect to, and interact with, our clients.

Darren is a Tax Agent and Chartered Accountant. He holds a Bachelor of Business (Accountancy) and a Master of e-business. He is also a Justice of the Peace.

## Kellie Powell CPA

Kellie enjoys building great working relationships with clients. She seeks to understand individual client needs and strives to make a positive contribution to their financial affairs.

Other than Kellie's interest in working with all types of clients to provide effective taxation solutions, Kellie specialises in Self-Managed Superannuation Funds (SMSFs), a key part of which is to ensure that a client's retirement benefits are in order and maximised.

People are the greatest asset of most businesses, with PT Partners being no exception. Kellie manages the Human Resource Management (HRM) function within the firm. By ensuring that we have a happy, motivated team and a winning culture, Kellie sets the path for our clients to be delivered an outstanding service experience.

Kellie is a Tax Agent and CPA. She holds a Bachelor of Business, is an Authorised Representative of Securitator and is licenced to provide financial and SMSF advice.

## Peter Thorp Chartered Accountant

Peter's passion is working with clients who are committed to improving their businesses. His goal is to be a part of the business improvement process and see that his advice makes a real difference to his clients' outcomes.

The major focus of Peter's client work is small to medium enterprises, business owners and private investment clients. Since founding the business in 1998 and building a committed team of professionals in PT Partners, Peter has refined his small business expertise across a range of disciplines to assist small business clients.

Outside of his client interests, Peter also sits on a number of industry advisory boards, including with the Australian Taxation Office (ATO). In addition to having a real say, Peter's presence on these boards also keeps him at the forefront of change.

Peter is a Tax Agent and Chartered Accountant. He holds a Bachelor of Business (Accountancy). He is also a Commissioner of Declarations.



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