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# SUNSHINE COAST QUEENSLAND

## B B WHITEHOUSE GROUP - CLIENT SERVICES

To meet the increased complexity of managing both SME (Small to Medium Enterprises) and individuals taxation, accounting, finance and IT requirements today, we have merged together **two** resilient and well known SME specialist accounting firms to deliver a comprehensive and sound level of professional services to manage the unique requirements of individuals and businesses located **on the Sunshine Coast**. This service is further enhanced and lifted by joining these firms to the B B Whitehouse Group, allowing them to access and deliver to clients a wide range of specialist skills, while maintaining a personal level of service that can only be achieved from a local business.

Every client is looked after by a local team that will include a Senior Client Manager, a Senior Accountant and an Executive Assistant. Your client manager will have skills in a wide range of areas ensuring that all of your professional needs can be met, however they will also provide specialist skills in business development advice and financial planning services as well as general knowledge in taxation and accounting. Your senior accountant will possess a high level of taxation and accounting knowledge and ensure you are provided with the highest level of skills within this area for the completion of your taxation work and preparation of financial accounts. The executive assistant is always available for you to ensure all of your needs are met and your questions answered regarding your work, fees, documentation and any specialty services you are receiving.

This team will work together to provide you with the highest level of service. Each of these teams throughout the group and in various geographical locations carry specialty skills covering a diverse range of professional services including but not limited to:

### Taxation Services:

- Annual Taxation Compliance
- Taxation Planning, objections and rulings
- Taxation Advice – GST, CGT, FBT, Employment Taxes, International Taxation

### Accounting Services:

- Preparation of Financial Statements for Reporting & Non-Reporting Entities
- Preparation of Bank Purposes and Special Purpose Accounts
- Bookkeeping and Accounting Outsourcing Services including Intersync

### Advisory Services:

- Business Structuring and Asset Protection
- Estate Planning
- Business Recovery and Turn Around
- Valuations

- Business eCommerce and IT Services
- Business Finance (including Balance sheet lending and factoring)
- Mergers and Acquisitions

### Self-Managed Super Fund (SMSF) Services

- SMSF Administration and Compliance
- SMSF Audit
- SMSF Borrowing and Gearing

### Audit Services

- External Audit for Companies, Associations, Government, Not for Profit, and Body Corporates
- Internal Audit
- Forensic Accounting

### Other

- Company Secretarial Services
- Grants and Government Incentive Advice and Application

This allows your local accounting team to access, cost effectively, a range of experts to ensure that SME's are able to access a high level of advice that far exceeds what most small accounting practices can deliver without you having to lose contact with your local team.

Covering this wide range of services is essential to the success of any SME in today's complex world of legislative variance and change and ensures that while dealing with a local provider, you are able to access a diverse range of skills and professional services from one place, cost effectively.

## CLIENT OFFERING

All clients will receive access to a team of three specialist staff that will work together to meet all of their requirements and needs.

In addition to this, we provide a range of specialist services and offerings.

### **Online Individual Tax Returns - \$60**

Through our unique mobile and web portal we are able to provide to individual clients an easy access and simple online tax return service. The process is simple and takes minutes rather than hours with all questions in easy to understand English – simply login, answer 13 questions and upload or take photos of your supporting documents – we will do the rest. This also reduces the cost of return to as little as \$60.

### **Free Services for Clients Children**

To help our clients and to also help their children when they first start to have to complete tax returns or enter business for the first time, we offer a range of free services including:

1. Free Tax Returns – for the children of existing clients. This will only stop once the children are over 25 or they take on investments personally (at the discretion of your local team).
2. Free Company and Trust establishment when they enter business for the first time as well as free initial consultations on structuring and asset protection advice.

### **Free Services for Start-up Businesses**

In line with the recent Government incentives to allow new start-up businesses to access better risk structures, grants and tax exemptions, we are offering all new start-up businesses a free company and trust establishment when they seek fee based asset protection and business structuring advice.

In addition to this all initial consultations of 1 hour are free of charge.

### **Business Valuations**

All of our clients can obtain a short form business valuation service, free of charge annually when their tax returns are completed. All Intersync clients receive this service for free at all times.

### **Estate Planning**

Our Estate Planning service is unique in that it not only encompasses the completion of wills, but will review, your business valuation, a comprehensive business and personal wealth gap analysis for planning for your future requirements, asset structuring to allow for effective access to retirement and nursing homes, aged pension access and asset structuring today, SMSF use, risk insurance and allocated pensions and family wealth distribution and management.

Initial Estate Planning assessments are offered free of charge and should be considered by clients of all ages.

## Financial Planning

All of our clients are provided with access to financial planners to consider all of their investment needs.

## Intersync Services

These are a specialised service for businesses centered around our automated online book-keeping. Intersync was designed and created to deliver to SME's a comprehensive virtual CFO service at a cost effective price. Intersync provides to clients one or all of the following combined services for a simple monthly fee allowing SME's to not only control their costs and spread them out over 12 months, but to also allow them to access a high level of service, beyond anything offered by accounting other firms today:

1. Automated online book-keeping service;
2. eCommerce consulting and development services;
3. Annual taxation compliance services;
4. Specialist services in valuation, wealth creation, business structuring and asset protection, business development and estate planning.

Intersync also allows SME's to enter and investigate the world of App development, eCommerce platforms, cloud accounting and service delivery and digital interruption for their business.

All Intersync clients have access to the groups internal IT specialists, senior accountants and advisers on all levels and internal legal advisers, all while having completed their annual compliance requirements and obtaining business development structuring advice.

Intersync is a comprehensive service that allows clients to access all of our multilayered services at one monthly cost price resulting in not only getting your compliance requirements met and financial accounting book-keeping attended to, but to also access specialists and seek more advice and knowledge to grow and develop your business.

## Finance

Our team of finance specialists have brought together a range of lenders and brokers that will deliver to all clients an opportunity to increase their wealth or meet their needs through an appropriate finance structure.

We also specialise in looking for finance to assist businesses undertake mergers and acquisitions strategies.

We include finance areas:

1. Debtor financing/factoring;
2. Short-term finance;
3. House and commercial property finance;
4. Business finance;
5. Property development finance structures.

## Self-Managed Superannuation

Our specialists provide advice to and services in SMSF to more than 30 other accounting firms today. We provide to our client's not only standard and cost effective audit and compliance services, but also administration and specialists advice services covering all aspects of SMSF including borrowing and commercial property structures.

## **Legal and Specialist Taxation Advice**

Our internal legal team can provide to you services comprising the establishment of all entity structures, advice regarding agreements, corporate advice, taxation services including international taxation structures, ATO negotiations and objections and asset protection strategies.

Very few accounting firms can offer this level of service to SME clients cost effectively, however our structure and group permits this to be delivered to clients cost effectively ensuring they get the best comprehensive advice available within limited resources they have available.

## **Business Recovery/Turnaround Services**

This is a unique and focused area of our services that the group have specialised in for more than 10 years with excellent results for all our clients, whether these are direct clients or businesses that our clients have had trouble getting their invoices paid by.

Business recovery involves the securing and recovery of assets from businesses that are in financial difficulty and then the turnaround of these business assets and the business to continue to operate in the future – another term for this service is pre-insolvency.

All businesses that we have taken on have been successfully turned around and many continue to access Intersync services to ensure they avoid financial difficulty in the future. Businesses that continue to use our services have all reflected continued long term success following the turnaround – especially those that are making use of Intersync and the advice and knowledge provided within this service.