

KELLY + PARTNERS

CHARTERED ACCOUNTANTS

Company Profile



K+P Difference

Tailored, expert advice

Most individuals and business owners are very busy and find coordinating the services of their accountants, specialist tax advisors, finance brokers, insurance broker, financial planner and lawyers a real pain.

What KELLY+PARTNERS do is manage your complete – personal and business – financial universe.

You have a Client Director as your point of contact who then coordinates the delivery of services from the Firm's accountants, advisors, consultants and financial planners in an integrated manner.

The comfort of knowing that 'everything is taken care of' is tremendously valuable to those achieving and seeking lasting success.

Integrated solutions

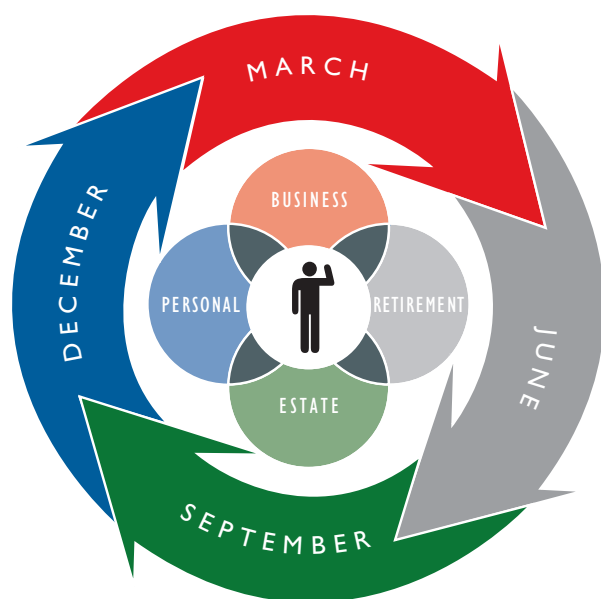
At the heart of the client's experience of KELLY+PARTNERS is the integration of the skills of a multi-disciplinary team of financial professionals that assist business owners and high net worth individuals in mastering their financial affairs.

Advisory – Tax Structuring, Strategy, Valuation, Business Broking

Compliance – Accounting, Taxation, Audit, Regulatory

Finance – Business, Personal

Wealth – Planning, Protection, Management, Estate



Philosophy

The KELLY+PARTNERS philosophy is simple – expert advice tailored to the client's unique personal and business circumstances. Structured systems and year round contact ensure timely, sophisticated and forward-looking advice.

Most people know they need an accountant for taxation purposes. But an accountant can do much more for your business. A good accountant is aware of the economic, legal and financial environment affecting you and your business, and uses their knowledge and experience to anticipate changes and plan for survival and growth.

Because individuals and business owners become immersed in the day-to-day operations it is important to have an independent view of their personal and business situation. In order to ensure the highest levels of satisfaction from your professional advisors at KELLY+PARTNERS we encourage our clients to note the following:

- 1 Understanding client's aspirations and detailed requirements is the key to our ability to deliver outstanding results.
- 2 KELLY+PARTNERS don't want to be average advisors to their clients – they want to be great.
- 3 The success of the clients of KELLY+PARTNERS ensures the satisfaction and meaningfulness of the work that KELLY+PARTNERS advisors undertake.
- 4 In order to achieve the above, Kelly+Partners have detailed and highly structured service processes that give the best chance of a consistently outstanding level of service to clients.
- 5 KELLY+PARTNERS advisors understand that everything delivered on behalf of a client must create value and that this value must be communicated.
- 6 KELLY+PARTNERS choose their clients carefully after considering their position with respect to being able to add value to that client.
- 7 KELLY+PARTNERS create value and charge a fee that represents excellent value for money. Kelly+Partners is not a bank and offers no credit. Our VIP payment terms are 50% of the engaged fee upfront and the balance on completion of the assignment.

K+P Team | North Sydney

Brett Kelly B.BUS, CA, M.TAX, DIP.FS, FTIA, JP
Senior Client Director



Brett has more than 18 years commercial and professional accountancy experience. He has specialised in Structuring, Strategy and Valuation. He commenced his career spending five years with Price Waterhouse, has worked in senior management roles across Audit, Business Services and Corporate Finance.

Brett is married to Rebecca and they have two sons, Thomas and Nicholas. Interests include reading, sports – especially snow skiing, fine arts and study. He is the best-selling author of two books.

Craig Bullock B.EC, CA, M.TAX
Senior Client Director



Craig has over 10 years accountancy experience. He has specialised in Taxation, Accounting Assistance and Structuring. He is completing a Graduate Certificate in Applied Finance and Investment. Craig is married to Jodie and they have four children. His interests include snow skiing, all sports and study.

Ada Poon B.COM, CA, M.COM
Client Director



Ada has over 10 years accountancy experience. She specialises in Outsourced Finance Department provision, Personal and Business Compliance, Taxation and Structuring.

Ada is married to Patrick and they have a son. Her interests include reading, travel and spending time with her family.

Andrew Howe B.COM, CA
Client Director – Audit Services



Andrew has over 20 years professional accountancy experience. He began his career with Coopers & Lybrand (later PricewaterhouseCoopers) in 1990, and as a Senior Manager in the Private Client Services division was responsible for providing audit, taxation, accounting and business advisory services to private

companies, not-for-profit entities and multinational subsidiaries.

Andrew's interests include music, film and literature.

Rex Hoeben FCA, REGISTERED COMPANY AUDITOR
Senior Client Director



With over 30 years experience, Rex began his career in accountancy with Coopers and Lybrand, then for 22 years he developed and grew the former mid-tier accountancy practice Pritchard Adams. Rex's expertise is in providing trusted advice to accomplished individuals and companies involved in a range of endeavours.

Rex is married to Julie and they have adult children, John, Sam and Claudia. His interests include golf, family and collectibles.

Peter Dawkins CA, REGISTERED COMPANY AUDITOR, JP
Senior Client Director



Peter has more than 25 years experience in public practice as a Chartered Accountant. His career in accountancy started with Touche Ross & Co, then for a period of 4 years he was a member of the Taxation Division of one of Australia's largest public companies. Peter joined Griffiths, Forrest & Greer in 1986 and was admitted as a

Partner in 1988 and has assisted in the development and growth of this former mid-tier accountancy practice.

Peter is married to Louise. He has 3 children Erin, Nicolle and Samuel. Interests include family, music, soccer and surfing.

Matthew Bell B.COM, CPA
Client Director



Matthew has over 12 years accounting experience. He specialises in tax, compliance and in particular corporation tax. His career started with The Thomson Corporation (now Thomson Reuters) where he worked for 3 years before moving to PricewaterhouseCoopers.

He then spent a year with Deloitte as the

Principal within the Western Sydney Tax Services team.

Matthew is married to Belinda they have two young daughters Catalina and Charlotte. Interests include spending time with his family, triathlon, snow-skiing and golf.

K+P Team | South West Sydney

Bill Croker FCA Senior Client Director



Bill Croker has over 40 years accounting experience. Bill had considerable experience in his first 10 years working for one of "the big 5 firms" Deloitte Haskins & Sells (now Deloitte). For 31 years Bill has developed and grown his own accounting practice. He is very well known and respected in the Macarthur business community.

Bill is married to Mary and they have two adult children, Will and Joanna. Interests these days are spending as much time as possible with his grandchildren.

Brett Kelly B.BUS, CA, M.TAX, DIP.FS, FTIA, JP Senior Client Director



Brett has more than 18 years commercial and professional accountancy experience. He has specialised in Structuring, Strategy and Valuation. He commenced his career spending five years with Price Waterhouse, has worked in senior management roles across Audit, Business Services and Corporate Finance.

Brett is married to Rebecca and they have two sons, Thomas and Nicholas. Interests include reading, sports – especially snow skiing, fine arts and study. He is the best-selling author of two books.

Peter Campbell BCOM, CPA Senior Client Director



Peter has more than 15 years experience across accounting, insolvency and banking. He began his career in accountancy with BCP Accounting & Business Advisors. Peter's expertise is in providing trusted advice to accomplished individuals and companies involved in a range of endeavours.

Peter is married to Jeanna and they have two children, Thomas and Olivia. His interests include all sports, especially volleyball, family and just enjoying life.

Kim Meredith BCOM, CPA, SSA, JP Senior Client Director – SMSF Specialist Advisor



Kim has over 25 years experience in public practice. The first 13 years were in business services (incl. superannuation) with a Sydney CBD firm and of late as part of the BCP Group. She is recognised as a 'SMSF Specialist Advisor'® with Australia's peak SMSF body, SPAA. Kim specialises in providing compliance and taxation advice to

Trustees and other advisors of Self Managed Superannuation Funds.

Kim has two children and her interests include reading and spending time with family and friends.

Tim Bryan BCOM, CA Senior Client Director



Tim is a Chartered Accountant and has been an Institute of Chartered Accountants member since 1989. Tim became a Partner in the accounting practice BCP Accounting & Business Advisors in 1998. Prior to BCP, Tim worked in the business services sector of international firm, PKF Sydney and then Einfeld Symonds – BDV, both in Sydney. His

experience is with medium and large sized enterprises ranging from family based groups, foreign controlled companies, licensed clubs and various legal and other service industry clients.

Tim is actively involved in a number of community and business organisations including a Vice Chairman of the Macarthur Business Enterprise Centre, Director of The Kids of Macarthur Health Foundation, Chairman St Gregory's College Finance Advisory Committee and Director of the Ingham Research Institute.

Tony Eagar BBUS, FCPA, FTIA, JP Senior Client Director



Tony Eagar is a CPA, a registered tax agent and a registered company auditor with over 30 years experience advising a diverse range of clients. Tony commenced his professional career in a large city practice before taking up a cadetship with the Australian Taxation Office, where he gained valuable technical experience in dealing with

tax issues and administration, including audits and investigations.

He has developed a reputation as both a tax consultant and business advisor and has a long track record of effectively representing clients in dealing with ATO audit matters.

Tony is married to Anne and they have five adult children.

Daniel Kuchta BCOM, CA Client Director – Audit Services



Daniel has over 13 years experience in audit. He began his career in 1997 with a small city based Chartered Accounting firm before moving to one of Macarthur's leading financial services group. Daniel has been responsible for providing audit, taxation, accounting and business advisory services to private companies, not-for-profit entities and multinational subsidiaries.

Daniel is married to Michelle and has three children, Logan, Kaylee and Addison. Interests include quality family time, soccer coaching, voluntary not-for-profit work and the beach.

K+P Team | Western Sydney

Brett Kelly B.BUS, CA, M.TAX, DIP.FS, FTIA, JP
Senior Client Director



brett@kellypartners.com.au

Brett has more than 18 years commercial and professional accountancy experience. He has specialised in Structuring, Strategy and Valuation. He commenced his career spending five years with Price Waterhouse, has worked in senior management roles across Audit, Business

Services and Corporate Finance.

Brett is married to Rebecca and they have two sons, Thomas and Nicholas. Interests include reading, sports – especially snow skiing, fine arts and study. He is the best-selling author of two books.

Andrew Zoghbi B.COM, CA, REGISTERED TAX AGENT
Client Director



andrewz@kellypartners.com.au

Andrew holds a Bachelor of Commerce and is a Chartered Accountant. He lives in the Penrith area and enjoys helping business owners manage their business in an efficient and effective manner.

Andrew loves the outdoors, skiing and spending time with family and friends. He also enjoys fishing and a game of tennis.

Diane Courtman B.COMM, MBA
Consultant



diane@kellypartners.com.au

Diane Courtman holds an extensive range of qualifications including a Master of Business Administration degree. She has provided accounting and management consulting services to a broad range of industries for the past 26 years and is also well known within the real estate industry.

Charbel Geagea B.BUS, CA, REGISTERED TAX AGENT
Client Director



charbel@kellypartners.com.au

Charbel is a Chartered Accountant who has grown up in the Penrith area. He enjoys interacting with clients and assisting them with their accounting and taxation problems.

Charbel is a keen health and fitness exponent and enjoys sports, travel and spending time with family and friends.

Ada Poon B.COM, CA, M.COM, REGISTERED TAX AGENT, JP
Client Director



ada@kellypartners.com.au

Ada has over 10 years accounting and assurance experience. She specialises in the provision of Outsourced Finance Department, Personal and Business Compliance, Taxation and Structuring.

Ada is married to Patrick and they have a young son Jonathan. Her interests include reading, travel and spending time with her family.

Tafizul Mohammed BA, CA, REGISTERED TAX AGENT
Client Director



tafizul@kellypartners.com.au

Tafizul has more than 12 years professional accounting experience. He grew up in Fiji and attended the University of the South Pacific. Before joining Kelly+Partners Tafizul worked at KPMG Fiji and Boroughs Australia.

Tafizul lives in Western Sydney and enjoys riding motorcycles and fishing. He is married to Soma and they have a young daughter Aliyah.

Bruce Williams B.COM, B.BUS, MBA, CA
Consultant



bruce@kellypartners.com.au

Bruce Williams is a Chartered Accountant who holds both an accounting degree and Master of Business Administration Degree.

Over the past 26 years Bruce has developed a reputation as a leading adviser of taxation and business operations within a broad range of businesses including the rural and real estate industries.

K+P Team | Norwest

Brett Kelly B.BUS, CA, M.TAX, DIP.FS, FTIA, JP
Senior Client Director



Brett has more than 18 years commercial and professional accountancy experience. He has specialised in Structuring, Strategy and Valuation. He commenced his career spending five years with Price Waterhouse, has worked in senior management roles across Audit, Business Services and Corporate Finance.

Brett is married to Rebecca and they have two sons, Thomas and Nicholas. Interests include reading, sports – especially snow skiing, fine arts and study. He is the best-selling author of two books.

Rex Hoeben FCA, REGISTERED COMPANY AUDITOR
Senior Client Director



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Rex is married to Julie and they have adult children, John, Sam and Claudia. His interests include golf, family and collectibles.

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He then spent a year with Deloitte as the Principal within the Western Sydney Tax Services team.

Matthew is married to Belinda they have two young daughters Catalina and Charlotte. Interests include spending time with his family, triathlon, snow-skiing and golf.

Andrew Zoghbi B.COM, CA, REGISTERED TAX AGENT
Client Director



Andrew holds a Bachelor of Commerce and is a Chartered Accountant. He lives in the Penrith area and enjoys helping business owners manage their business in an efficient and effective manner.

Andrew loves the outdoors, skiing and spending time with family and friends. He also enjoys fishing and a game of tennis.

K+P Team | Central Coast

Scott Elwin B.COMM, CA
Senior Client Director



For more than 12 years, Scott has provided accounting, taxation and business advice to individuals, families and businesses. Scott worked for ten years in Sydney CBD Chartered Accounting firms and in commercial roles in multinational companies based in London.

He holds a Bachelor of Commerce,

Australian National University, Canberra; is a Chartered Accountant and Registered Tax Agent. He is currently completing his Masters of Taxation at the University of New South Wales.

Scott grew up in rural Leeton, NSW, ensuring an approach to life that is 'straight talking' and practical. Scott is married to Kylie and has three young sons, Millar, Nicholas, Drew and a daughter Olivia.

Brett Kelly B.BUS, CA, M.TAX, DIP.FS, FTIA, JP
Senior Client Director



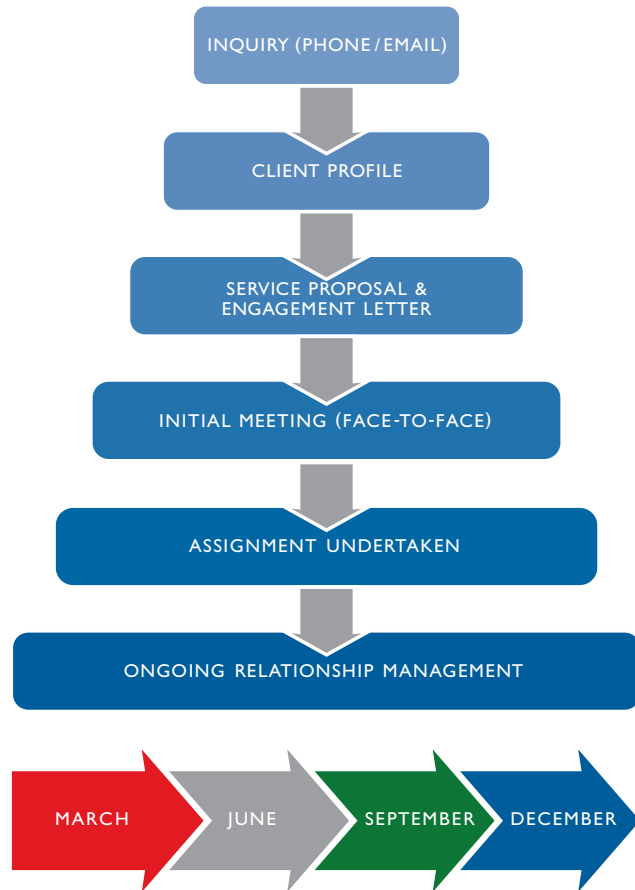
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Brett is married to Rebecca and they have two sons, Thomas and Nicholas. Interests include reading, sports – especially snow skiing, fine arts and study. He is the best-selling author of two books.

K+P Process

What K+P clients say

KELLY+PARTNERS deliver a personalised service through a structured process that ensures all requirements are agreed in clear engagement terms and that the agreed requirements are executed on time at the agreed price.



"There are two factors that have helped my business grow: The number one thing would be my wife, and the number two thing would be my accountant. If you really want your business to succeed and grow, they are the people to have on board."

BUSINESS OWNER, EQUIPMENT HIRE

"KELLY+PARTNERS are a very well organized, very well run organization. They are passionate about their clients, their staff and how they are managed and I think that makes a big difference in accounting firms I've spoken to."

SUPPLIER, IT SOFTWARE

"What I like about KELLY+PARTNERS is it's a two way street. As a business partnership, they look to help our business not just on the financial side, but they promote our business actively and we feel comfortable promoting their business."

BUSINESS OWNER, INTERIOR DESIGN AND PROJECT MANAGEMENT

"I am more than happy to recommend KELLY+PARTNERS. They are like mentors for me in growing the business and they offer far, far more than just a normal accountancy firm."

BUSINESS OWNER, REAL ESTATE

"I certainly find that everything we need, we get from KELLY+PARTNERS. I wouldn't dream of going somewhere else."

BUSINESS OWNER, ENGINEERING SERVICES

"At the end of the day, it's that personal relationship . . . I can pick up the phone, get on a mobile if it's urgent, and my calls get answered . . . If there is one word that sums it up, they 'care'. They actually care about myself, our family and the way we are growing. It's a partnership in every true sense of the word."

PRINCIPAL, REAL ESTATE

"I recommend KELLY+PARTNERS. They are very professional, very specialized in their field, which in my line of work is important . . . It's good to hand over the reins and certain needs."

BUSINESS OWNER, DENTAL PRACTICE

KELLY+PARTNERS

CHARTERED ACCOUNTANTS

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