

KELLY + PARTNERS

CHARTERED ACCOUNTANTS

Motor Dealers



Kelly+Partners specialise in providing forward looking advice to Private Business owners.

Our tailored system enables us to help Motor Dealer Owners get their business and personal financial universe organised and ensures that advice is delivered pro-actively.

Our expertise

Specialist Motor Dealer services

Kelly+Partners Motor Dealer services team has worked with numerous dealerships over 20 years. This experience ensures our best practice services remain at the forefront of this competitive and fast-changing industry. Our team is committed to helping owners improve business profitability and to consistently deliver critical dealership services such as:

- assistance with franchise, dealership or site acquisition or disposal
- dealership valuation for equity participants, finance raising, changes in ownership, and compulsory acquisition preparation assistance with funding and finance applications
- dealership functionality through progressive dealership operational reviews
- best practice performance evaluations
- minimising Fringe Benefits Tax using
- better compliance sales management systems using our GST flowchart
- fraud prevention programs
- strategic advice
- employee incentive scheme

We also provide new dealer advocacy services to avoid the following traps:

- target selection and notification
- due diligence reviews
- LMCT and finance proposals
- manufacturer and distributor proposals
- contacts anywhere in the motor dealer industry and all related areas

Private Business Owner focus

As the leading advisors to Private Business Owners, Kelly+Partners is uniquely positioned to help dealer owners get their businesses and their personal wealth organised in a coordinated fashion. This owner-focused service model means that the business is viewed as the means to building wealth for the owner and not an end in itself.

The fundamental aspects of this model are:

1. Asset protection
2. Tax management
3. Retirement planning
4. Wealth management

Strategic analysis (owner & business)

Kelly+Partners Senior Client Directors regard forward looking advice as a crucial part of the relationship with our clients. This unique focus is undertaken for all clients, one-on-one, and away from their dealership. It takes a few hours and involves a degree of frankness and self-awareness. It helps the owner set the future path for the business, the owner and the wealth of the family.

The planning focuses on:

- target selection and notification
- profit improvement
- business management and strategy
- succession planning
- inter-generational wealth transition

For more information about Kelly+Partners Motor Dealer services please contact one of our specialists **Tim Bryan (02) 4625 7711** or **Brett Kelly (02) 9923 0800**.

Tim Bryan BCOM, CA Senior Client Director



With over 20 years experience, Tim became a partner in the accounting firm BCP in 1998. Prior to BCP, Tim worked in the business services sector of PKF 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 involved in community and business organisations including Vice Chairman of the Macarthur Business Enterprise Centre, Director of The Kids of Macarthur Health Foundation and Director of the Ingham Research Institute.

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.

"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

Kelly Partners (North Sydney) Pty Ltd ABN 94 119 966 933 Level 4 / 73 Walker Street (PO Box 1764) North Sydney NSW 2059 T 02 9923 0800 F 02 9923 0888

Kelly Partners (South West Sydney) Pty Ltd ABN 17 150 234 138 Suites 1-8 Kellicar Lane Macarthur Square, 200 Gilchrist Dr (PO Box 417) Campbelltown NSW 2560 T 02 4625 7711 F 02 4628 4364

Kelly Partners (Western Sydney) Pty Ltd ABN 66 059 148 319 Suite 7 / 12 Tindale Street (PO Box 878) Penrith NSW 2751 T 02 4721 7433 F 02 4721 7434

Kelly Partners (Norwest) Pty Ltd ABN 78 154 335 949 Suite 1G Macarthur Point, 25 Solent Cct, Norwest Business Park (PO Box 7084) Baulkham Hills DC NSW 2153 T 02 8852 5400 F 02 8852 5454

Kelly Partners (Central Coast) Pty Ltd ABN 51 118 966 331 Suite 2.06 Platinum Building, 4 Ilya Avenue (PO Box 3616) Erina NSW 2250 T 02 4367 6630 F 02 4367 6632

info@kellypartners.com.au www.kellypartners.com.au LIABILITY LIMITED BY A SCHEME APPROVED UNDER PROFESSIONAL STANDARDS LEGISLATION



Chartered Accountants



COVER OF EXCELLENCE