

# KELLY + PARTNERS

CHARTERED ACCOUNTANTS

Franchise Services | Building a financial legacy



The Franchise Group is not responsible for what a franchisee does in their personal financial universe.

Unfortunately, most business owners while doing well in the business are a mess in their personal financial sphere.

This is where Kelly+Partners really excel – in ensuring that the Private Business Owner takes the proceeds from business success and generates a lasting legacy for family, friends and community.

# Our expertise

## Franchise Services

Kelly+Partners unique approach to servicing the franchise market is centred on developing relationships with franchise group, franchisees and financiers.

Our experience and relationship with franchise groups gives us real time insight on franchise systems and their performance. We are regularly involved in advising franchise groups together with completing valuations of franchises and provide business, taxation and accounting services.

As a result Kelly+Partners are in a position to provide extensive services to franchise groups, existing franchisees and those considering commencing in a franchised business.

Kelly+Partners services include:

### FRANCHISEES

- **Franchise Acquisition** – due diligence, financial modelling, financial and taxation aspects of legal negotiation (together with clients lawyers), negotiation.
- **Financial Reporting** – budgeting, performance vs budget, cashflow management.
- **Financial Performance** – Review (including benchmarking) and Improvement Strategies.
- **Personal CFO** – managing all aspects of the Business Owners Family finances towards agreed goals.
- **Franchise Disposal** – due diligence, financial modelling, financial and taxation aspects of legal negotiation (together with clients lawyers), negotiation.

### POTENTIAL FRANCHISEE

- Due diligence
- Valuation
- Appraisal of franchise opportunity and your circumstances
- Financing
- Performance



## About us

KELLY+PARTNERS is one of Australia's leading accounting and business advisory practices, with more than 30 years strata plan audit experience.

**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, and 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.

**Tim Bryan** B.COM, 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

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