



## **CBSW is a Boutique Professional Chartered Accounting Practice Providing**

- ▶ Taxation Compliance & Advisory
- ▶ Business Advisory
- ▶ Accredited Family Business Consulting
- ▶ Specialised Business Growth Advisory
- ▶ Superannuation Advisory
- ▶ Estate Planning

Services to high net wealth family businesses and individuals.

## **Providing you Professional Direction In**

### **COMPLIANCE MATTERS**

We provide peace of mind to businesses and individuals when it comes to compliance attendances, whether it is in the areas of Taxation, State Revenue, ASIC or other matters. You can focus on what you do best and need to be doing, confident in the knowledge that all requirements are competently attended to as and when required, despite the on-going legislative changes that will inevitably continue. CBSW's in-house advisors combined with our access to a network of complementary professionals, where required, ensures we are able to provide you with services that meet your high level needs with confidence.

### **BUSINESS GROWTH ADVISORY**

The primary success measure of a business is its financial performance (rather than "growth" for growth's sake); it's the "score" and is the market's way of reflecting customer satisfaction. There are three steps required to first understand, then monitor and finally improve your financial performance by imbedding your financial Key Performance Indicators (KPI's) into your management process by:

- ▶ Identifying your key financial drivers
- ▶ Monitoring and benchmarking
- ▶ Imbedding the key drivers into your business

The team at CBSW works with SME's by assisting them to run and develop their businesses efficiently, professionalising the business through:

- ▶ Strategic business planning
- ▶ Financial performance diagnosis
- ▶ Budgeting and cashflow forecasting to preferred Bank standard of presentation
- ▶ Systems and processes advice

### **STRATEGIC TAX CONSULTING**

More than ever, businesses and individuals require strategic tax advice to meet their particular needs, including:

- ▶ Business structuring and ownership
- ▶ Asset protection
- ▶ Restructuring and tax efficiency
- ▶ Small business capital gains tax concessions on exit
- ▶ Practical and commercial non-complex solutions

Using our extensive experience, we work with you to best understand your needs and then provide the most appropriate advice, ensuring implementation is affected promptly.

### **WEALTH CREATION & ESTATE STRATEGIES**

Financial security is important to all of us; so early and effective planning are vital to achieving your goals. We work with you, in conjunction with external alliance partners, in providing solutions and strategies relevant to your circumstances and assist with the implementation of the plan. Typically the areas we can assist you with include:

- ▶ Retirement planning
- ▶ Superannuation and Self-Managed funds
- ▶ Business Succession planning
- ▶ Estate planning and Insurance solutions
- ▶ Negative gearing strategies
- ▶ Finance restructuring strategies

## Our Key Attributes Designed To Help You

We pride ourselves on assisting clients through our commitment to :

- ▶ **RELIABILITY:** responding to your needs & communications promptly and meeting agreed deadlines.
- ▶ **COMMUNICATION:** striving to communicate with you proactively, including providing useful and regular updates.
- ▶ **RESPONSIVENESS:** timely service delivery.
- ▶ **QUALITY DOCUMENTATION:** providing user friendly documentation, written appropriately for the end user.
- ▶ **UNDERSTANDING YOUR BUSINESS/INDUSTRY:** giving advice tailored to your needs that is both relevant and commercially feasible and by ensuring we have a clear knowledge of your business and industry.

## The Key Competitive Advantages Of CBSW Are:

- ▶ Breadth of experience and Technical & Commercial Knowledge of the Directors and Professional Team
- ▶ Long term client relationships and a strong professional network within the Perth Business Market
- ▶ Competitive fee rates given the experience of Directors and the Professional Team
- ▶ Quality referral network both within existing client base and external network
- ▶ Specialised Accredited advisors in Family Business and Business Growth Advisory

## Key Senior Personnel

Senior Professional Team	Years in Profession	Qualifications/ Professional Memberships				Other Comments
		ICAA	CPA	TIA	FBA	
Robert Casamento - <i>Director</i>	30+	✓		✓		Accredited Growth Advisor
Lyllal Bear - <i>Director</i>	30+	✓	✓	✓	✓	Accredited Family Business Advisor
Stephen Spry - <i>Director</i>	15	✓		✓		
Matthew Walsh - <i>Director</i>	11	✓		✓		
Anna Casamento - <i>Manager</i>	24	✓		✓		
Tatiana Mills - <i>Manager</i>	12		✓	✓		

ICAA: Institute of Chartered Accountants Australia CPA: Certified Practising Accountant TIA: Taxation Institute of Australia FBA: Family Business Australia

## Business Success Insights

Most business owners know there are only four ways to grow their business, and whilst growth objectives remain important, long term success relies on a broader understanding of business, its mechanics and the need for balance in all parts of the organisation. In short, from a strategic viewpoint how you position your company in relation to your competition and in the minds of customers will ultimately determine the medium and long-term success you achieve. This success will be determined by focus and achievement in four areas:

- ▶ **FINANCE**
- ▶ **CUSTOMERS AND CAPABILITIES**
- ▶ **SYSTEMS, PROCESSES AND WAYS OF WORKING**
- ▶ **PEOPLE, STRUCTURE AND LEADERSHIP**

Planning and taking action in these critical areas is critical, not just to ensure your company's short-term prosperity, but in order to lay the foundations of its long-term success. Without a sound strategy in each of these sectors, reactive short-term moves and unplanned responses to market conditions only delay the inevitable problems you are or may be facing either now or in the future.

Additionally, Family Businesses face many unique challenges that CBSW are accredited to advise you in, including business succession planning and implementation.

## More Information

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Providing you  
professional  
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