



TAX & ACCOUNTING FOR GROWTH-STAGE & EXIT-READY OWNERS

Accounting & Taxation Services

Income tax, CGT, FBT, GST and superannuation, handled properly - then used as the foundation for a real financial strategy.

A GUIDE FOR OWNERS WHO WANT TAX WORKING WITH THEM, NOT AGAINST THEM

WHO WE WORK WITH

Compliance was never the point. It's the platform.

You didn't build a significant business to spend your time worrying about whether your tax position makes sense. Whether you're scaling hard or a handful of years from an exit and staring down a CGT bill in the hundreds of thousands, most accounting relationships stop at compliance. Ours doesn't - we treat tax and accounting as the platform for a bigger conversation about profit, structure, and what you actually keep.

THE PROFILE, AT A GLANCE

\$4M–\$20M+

ANNUAL REVENUE

\$600K–\$2M+

TYPICAL CGT EXPOSURE AT EXIT

Founder / MD

DECISION MAKER

Growth or Exit

STAGE WE ENGAGE

Melbourne-based

CLIENT BASE

The gap between “compliant” and “optimised”

Three categories of strain we see consistently in growing and exit-ready businesses.



Forward Visibility

- Financial clarity that only looks backward, never forward
- Profit leakage despite strong top-line revenue
- Tax outcomes that surprise you at year-end, not before it



Structure & Tax Alignment

- Business structures built for growth, never revisited for tax efficiency
- Tax strategy disconnected from personal wealth creation
- Superannuation contributions and structuring left on the table



Exit & CGT Exposure

- CGT exposure of \$600K–\$2M+ sitting unaddressed
- Small Business CGT concessions not identified or maximised
- Trust distribution complexity surfacing at the worst possible time

Full compliance, delivered with a strategic lens



Core Compliance

Income tax, GST & BAS, FBT, superannuation and SMSF tax - accurate, on time, every time.



Tax Planning & Structuring

Proactive planning throughout the year. We review your structure annually and flag when it's no longer serving you.



CGT & Concessions Strategy

Modelling your CGT exposure well before a transaction and identifying every Small Business CGT concession available.



Trust & Distribution Advice

Clear, defensible trust distribution strategies that hold-up under scrutiny and align with your wealth position.

HOW WE WORK

Advisory first, compliance always

- We're proactive - flagging issues before they arrive, not explaining them after
- Fixed-fee packages, agreed upfront - no surprises in your invoice
- Direct, commercially-minded communication throughout
- One firm coordinating your tax, structure and wealth position



“You've built wealth. How much of that do you keep?”

WHAT CLIENTS TELL US THEY WANT

- ✓ Tax strategy aligned with wealth creation, not just compliance
- ✓ Forward-looking financial visibility, not a once-a-year surprise
- ✓ CGT minimisation and every Small Business Concession identified
- ✓ A firm that anticipates issues rather than reacting to them
- ✓ One trusted advisor coordinating tax, structure and planning

Is this the right accounting relationship for you?



This is likely a strong fit

- \$4M+ revenue, profitable, and growing
- Wants proactive advice, not reactive lodgement
- Open to structural change if it improves the outcome
- Values a long-term advisory relationship over the lowest fee



Probably not the right fit

- Wants compliance only, at the lowest possible cost
- Resistant to reviewing or updating business structures
- Not yet ready to engage in forward tax planning



LET'S START THE CONVERSATION

Your tax position should work as hard as you do.

If your current accounting relationship stops at lodgement, we'd welcome the chance to show you what a genuinely proactive one looks like.

AFFINITY ADVISORY

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