



OUR SERVICES

Audit & Assurance Services

With the increased demand for reliable financial information it is important that you trust the professionals you choose to provide your assurance services.

At [BHT Partners](#) we make it our business to have an understanding of your business environment to align our assurance services with your business risks and corporate governance requirements.

At [BHT](#) we have a separate audit company, [BHT Partners \(Audit\) Pty Ltd](#) that is an ASIC authorised audit company and whose Directors are registered company auditors.

Our assurance service is not just about performing audits. We provide valuable knowledge to our clients about their processes, systems, operations and help them achieve their goals and objectives of effective risk management.

At [BHT Partners](#) we customise our audit approach to suit the size of your organisation. This enables us to provide you with an efficient assurance service appropriate to the critical areas of your business.

The result is our clients receive quality assurance services that add value to their business.

Services include:

- Compliance audits for ASIC
- Not for profit audits
- Financial due diligence reviews
- Superannuation audits
- Government regulatory compliance audits
- Trust Account audits
- Risk management
- System control reviews

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(Director of Audit & Assurance Services)
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Integrated Financial Services

Over recent years increasing amounts of legislation has been introduced to limit the advice given in the area of financial planning by non-qualified advisors.

While we at [BHT](#) have no problem with the intent of the legislation – to protect the community – this legislation has made managing one's financial strategy far more complex and fragmented than it needs to be.

It has also impacted on the real or perceived independence of the advisor. Most clients are now left in the position that it is much harder to get independent advice on comprehensive financial matters.

In response to this issue [BHT Partners](#) is now in a position to provide a truly independent, comprehensive and integrated financial service that meets the needs of our clients and does not breach the legislative requirements in relation to giving of financial advice.

[BHT](#) is able to provide this service by project managing our clients' financial affairs, acting as the intermediary between the financial planner, insurance broker, banker, solicitor and accountant.

Services include:

- Personal Goal Setting
- Risk Management:
- Insurance Requirements
- Wills
- Shareholder Agreements
- Family Constitutions
- Business Succession or Transition Planning
- Financial Planning Strategies
- Project Management of Investment Performance



Liability limited by a scheme approved under Professional Standards Legislation.

BHTPARTNERS

BUSINESS ADVISORS



OUR MISSION

To help **grow** and realise the **profit** improvement potential, business **value** and **lifestyle** choices of our clients through the **innovative** application of **wealth** creation strategies.

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ABOUT BHT

BHT Partners was formed in 1983, evolving from a partnership founded some thirty years earlier. Our business operates on the underlying principle that we should play a close and active role in the development and implementation of our clients' business strategies.

We believe that clients should receive sound and practical commercial advice based on an understanding of their long-term objectives.

The difference at **BHT Partners** is that we tailor our service approach to focus on the differing needs and opportunities of our clients. This means providing timely, accurate and understandable advice to ensure that your business has the best possible chance of success.

BHT Partners has immediate access to global information and resources through its membership of the RAN-ONE business consulting network. The network links **BHT Partners** to 135 accounting firms in the Asia Pacific region and 750 accounting firms worldwide.

The directors of **BHT Partners Pty Ltd** are:

Brian Taylor

Jim Tyrrell

Melinda McAllister

Our clients

BHT Partners cater to a diverse range of individual and business clients some of whom have been with the business for over thirty years.

BHT Partners' business clients come from a variety of industry sectors and are geographically wide spread throughout the Melbourne metropolitan area, country Victoria, interstate and overseas. Their turnovers range from \$100,000 to \$100 million annually, and subsequently their service needs vary from annual compliance requirements to monthly monitoring and mentoring.

Whilst acknowledging the importance of stability and longevity, we at **BHT Partners** are acutely aware of the need to be innovative and to provide up to date services that cater for the dynamic world of business.

To that end, **BHT Partners** prides itself on maintaining an enthusiastic and well trained team with access to the latest business tools and resources, enabling us to make a positive difference to your business.

Our team

BHT Partners has a talented and professional team dedicated to continuous professional development.

Clients can expect to deal with several team members who, because of their specialist knowledge, provide a range of services not typically available at a more generic accounting practice. Every client can expect to have a principal and an accountant knowledgeable in his or her business and available to answer all queries.

The directors and team members of **BHT** belong to a full range of professional associations including the Institute of Chartered Accountants in Australia, CPA Australia and the National Tax and Accountants Association.



OUR SERVICES

Taxation & Accounting Services

BHT Partners provides expertise in accounting and all major tax specialisations.

Taxes are a significant cost, so it is essential they be managed like any other business expense. And with taxation authorities now more active than ever in auditing all categories of taxpayers, there is a potential for significant penalties.

However, liabilities can be minimised and much of the stress associated with tax avoided through effective and forward planning.

BHT Partners can provide advice on tax obligations arising out of more complex matters and assist clients in managing tax office investigations.

A computerised service ensures efficient and fast preparation and processing of income tax returns.

Our website and email facility enables us to receive client data electronically, process it, and respond promptly to all regular monthly, quarterly and annual work.

Services include:

- Financial Accounts Preparation
- Book-keeping & Accounting Systems
- Income Tax Return Preparation:
- Personal
- Partnership
- Company
- Trust
- Superannuation
- Fringe Benefits Tax
- GST & PAYG Taxes
- Payroll Tax
- Capital Gains Tax
- Business Acquisitions & Disposals
- Company, Trust & Superannuation Formations
- Company Secretarial Services
- Superannuation Administration
- Tax Planning

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Business Advisory Services

To be successful in today's environment, a business cannot afford to stand still – it must continuously improve.

The ability to assess the performance of all aspects of your business is crucial to its effective management and ongoing success.

Business owners and managers need to have direct access to professional and timely advice, as well as the support of efficient management systems.

At **BHT Partners** we can implement management accounting procedures to ensure a flow of regular, meaningful financial reports. The preparation of budgets, forecasts and cash flow projections ensures your business strategies are kept on track.

We conduct annual business performance reviews to examine the health of your business, and then devise potential profit improvement strategies and financing alternatives.

Through active and close involvement in the business, **BHT Partners** can provide informed and practical assistance to make the most of business opportunities and emerging issues.

Services include:

- Business Performance Review
- Profit Improvement Strategies
- Strategic & Business Planning
- Management Reporting
- Budgets, Forecasts & Cash Flow Projections
- Customer Service Strategies
- Team Building and Performance Standards
- Succession Planning
- Estate Planning
- Finance Restructuring
- Loan Finance Applications
- Business Structures
- Business Valuations

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