




**MARSH & PARTNERS**  
Absolute. Account. Ability

**We make business life better.**

**Simple as that.**



## Welcome to Marsh & Partners

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## About Us



### We're on a mission to make business life better

At Marsh & Partners, we believe there is a better way to support business owners. A more valuable, less traditional way, where our clients have a partner rather than an advisor.

In fact, we're here to redefine the role of business accountants. Because we're not just Chartered Accountants with a theoretical knowledge of how business works – we're business owners like you. With a 30-year business history, we can guarantee we've come up against the same challenges you face and moved past them.

If you're driven to achieve wealth or business goals, you're in the right place. We'll keep you on track, we'll make sure things happen, and we'll stick by you as partners in business.

Businesses of every size and shape make Marsh the place where things get fixed.

# About Us

## Business fixers

Businesses face problems every day which can snowball out of control if not addressed quickly and confidently.

We approach business with a fix-it attitude. Because most problems are preventable and the ones that aren't are solvable.

## Business growers

Successful businesses don't just happen, they are made to happen.

If your business isn't working for you, we can help you get back in control and take charge of your future. We fix, we fine-tune, and we clear the path to better business.

## Future proofers

Businesses are constantly in motion: open to new influences and full of possibilities.

We keep you efficient and successful in today's world and keep you protected to ensure you survive and thrive in tomorrow's world.



**As your Absolute.Account.Ability partner, we'll help you set goals for your business, devise an Action Plan to make them happen, and keep you accountable to ensure you stay on track.**



## Our solutions

We've developed a bank of knowledge and strategies to help our clients create a successful, growing and sustainable business. The kind of business which will support your current needs and future goals.

From sorting out the easy stuff like bookkeeping, to navigating complex tax and business issues, we get you past the roadblocks.

With solutions to get every part of your business life into shape, and an energetic team to support you along the way, a better business life has never been easier.

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Marsh & Partners are more than an accounting firm, they understand Small Business. What levers you need to pull and the right time to pull them. Most importantly they understand the emotion and the roller coaster that business owners ride on a daily basis. Their guidance is underpinned by the key metrics, but melded together through general business advisory. Business is more than just the numbers and Marsh & Partners understand that.

**Ben Watts**  
Watts Next

# Our solutions



## BUSINESS IMPROVEMENT

A successful business is a constant process of tweaking, fixing, making tough choices and being accountable for performance. With Absolute.Account.Ability our business improvement specialists give you hands-on help to get your business moving.



## ACCOUNTING & TAX

We work with clients to make sure their ATO responsibilities are met and paid on time. We also make sure your tax liabilities are minimised using all the legal strategies at our disposal. Which means you don't pay a cent more than you have to.



## SELF MANAGED SUPER

Our future-proofing experts have extensive experience in the tax and compliance issues specific to self managed super funds. With expert guidance, you'll have peace of mind that you're ticking all the right boxes and avoiding any risk of non-compliance.



## BOOKKEEPING

We can free up your time and take the pain out of paperwork with our bookkeeping service. You'll get accurate insights on your financial performance and peace of mind that everything is up to date.



## CRISIS MANAGEMENT

We work with clients to find a way through a business crisis and give you hands-on help to get things back on track. From ATO issues to a cash flow crisis – there is nothing we haven't seen before and few problems we can't help fix.



## ESTATE PLANNING

Estate planning involves far more than just having a will. You need to future-proof your wishes and your family's wealth. Our estate planning specialists are experts in complicated tax matters, structuring and superannuation legislation.

# Our solutions



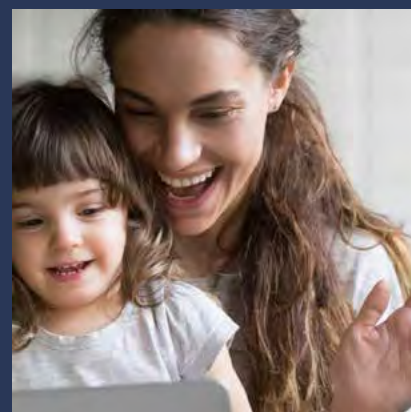
## SUCCESSION PLANNING

We work with you to consider the exit scenarios available to you given your goals, time available, potential successors and the current state of the business. Once we've got some strategies in place to grow value, we'll work alongside you to ensure they are implemented.



## QBCC SPECIALISTS

Get QBCC right with help from our specialist building and construction industry accountants. We do thorough reviews of your financial accounts prior to lodging to ensure you're compliant. If we come across a potential problem, we'll work with you to find a fix.



## SEPARATION & DIVORCE

We know that you may not be in the right frame of mind to face practicalities such as property and taxes. But we also know that you'll have peace of mind knowing that you have experts in your corner to secure the best possible outcome for you.



## STARTING A BUSINESS

Starting a business is an exciting and challenging time in your life. We're here to make your life easier. We'll do everything we can to support your business and goals because we're as keen as you are about having a vision and making it happen.



## VIRTUAL CFO

Our Virtual CFOs are accountants with extensive financial management expertise. They understand the key areas which contribute to success or failure, surviving or thriving. You'll have access to an expert who knows how to move your business forward and stay on track financially.



## BUSINESS VALUATIONS

Our valuation team has a thorough understanding of the components of value and the right blend of commercial experience and professional judgement to deliver a robust and fair assessment. You'll get a comprehensive analysis of key value areas and what to improve on for a better exit outcome.



## Meet the team

Relationships are the most important part of our business. Being part of your journey by having an in-depth understanding of where you are now and where you're headed means we're all on the same page.

With a focus on fixing, growing and future proofing, you can be sure we are partners in your business and personal goals.







## Terry Brauer

### Partner

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Bachelor of Business

Institute of Chartered Accountants

Certificate of Public Practice

CA SMSF Specialist

Member of the Australian Tax  
Institute

Diploma of Financial Planning

Terry heads up our Strategic Tax Consulting division and is passionate about assisting clients with complex and challenging taxation needs.

The Strategic Tax Consulting Division was developed in response to clients' needs for assistance with tax issues which do not fit within the general range of Accounting. In particular – family law, business dispute negotiation and ATO audit assistance. Terry also specialises in estate planning and inter-generational transfer of operations and businesses.

Terry's continued involvement with clients over 30 years has equipped him with the experience and knowledge to assist in complex taxation and family situations. He has an unparalleled reputation as a trusted advisor with the highest level of integrity and a superior knowledge.

Terry comes from a rural background and has vast experience with clients in large-scale cotton growing operations, cattle grazing, small crops farming, property development and professional service firms.



## Bronwyn Condon

### Partner

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Bachelor of Business (Hons)

Institute of Chartered Accountants

Certificate of Public Practice

SMSF Specialist Advisor

Commissioner of Declarations

Bronwyn is the Managing Partner of Marsh & Partners and has more than 25 years' experience in business development and management accounting. Joining Marsh & Partners in 1994, she quickly moved into management roles and, as a Partner, has been integral to the firm's growth and success.

As a business owner herself, she gets it. Running a business is hard work. But, when it's all working well and you're on the right track, it's also a lot of fun. Bronwyn works with businesses on strategy and long-term vision so you can feel you are in control, working with purpose and have time to enjoy the benefits of working for yourself.

Her passion is getting businesses into shape so owners can work on their other goals – whether that's a new project, wealth creation outside the business, or moving on from the business. Bronwyn wants to be part of the journey by bringing clarity and support to business owners who feel like they have to do it all themselves.



## Fred Patten

### Partner

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Bachelor of Business

Certified Practising Accountant

Certificate of Public Practice

Affiliate of Institute of Chartered Accountants

SMSF Specialist Advisor

A partner with over 25 years' experience, Fred Patten is a skilled practitioner and trusted adviser to a diverse range of high net worth individuals and SME businesses. He has developed extensive business knowledge and provides advice and strategy to help clients plan for their desired future.

Fred has a proven record of assisting businesses through each stage of their development. His clients cross multiple sectors and include family businesses, the hospitality industry, professional services, property and construction, retail and primary production. Fred takes a hands-on approach to working with his clients and has become an integral part of many of their businesses.

Fred provides business and strategic advice at client board meetings. He is also a member of TEC (The Executive Connection) group which accesses high value perspectives through monthly workshops and peer advisory group meetings.

In addition, he has particular interests in wealth creation and protection and heads up our dedicated Superannuation team. He specialises in compliance issues for Self-Managed Superannuation Funds and has expertise in retirement planning, contribution strategies and investment structuring.





## Cameron Allen

### Partner

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Bachelor of Commerce

Master of Property Studies

Certificate of Public Practice

Institute of Chartered Accountants

CA SMSF Specialist

Member of Tax Institute

Cameron is a Partner with over 19 years' experience in providing solutions in complex taxation and business matters.

Today's clients require their Chartered Accountant to offer more than just tax preparation and bookkeeping. They are looking for business planning and strategic advice, and a proactive, trusted advisor who has the right contacts to provide expanded service offerings. Cameron meets these expectations across the board. His dynamic approach has seen him assist our key clients to achieve their goals of tax minimisation and taking advantage of timely business opportunities.

Cameron is an early adopter of new technologies and is well placed to assist clients in making informed decisions about a variety of Accounting Software packages.

Cameron's specialties include: self-managed superannuation advice, business contract negotiations, complex taxation matters, family breakdown advice and mediation, salary packaging, business transmission and structuring.



# MARSH & PARTNERS

Business Accountants

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