



SV PARTNERS

ACCOUNTANTS FORUM

2023

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WELCOME



Michael Carrafa

Executive Director

Welcome to the SV Partners Accountants Forum! This event signifies our commitment to fostering knowledge exchange, collaboration, and innovation within our industry.

Over the two days, we have the privilege of coming together as a community of professionals, thought leaders, and experts to delve into a spectrum of topics that shape our ever-evolving landscape. From insightful presentations by industry leaders to engaging panel discussions, this conference promises a wealth of wisdom and ideas that will undoubtedly inspire and challenge us.

I encourage each one of you to actively engage, network, and exchange ideas. Embrace this opportunity to learn from one another's experiences, perspectives, and successes. Let us seize this moment to not only gain knowledge but to build bridges that will shape the future of our industry.

I extend my deepest gratitude to our speakers, sponsors, and the dedicated team behind the scenes who have tirelessly worked to make this conference a reality. Your contributions are the foundation of our collective growth.

Thank you, and let's make this inaugural conference an unforgettable experience.

OUR TEAM



Michael Carrafa

Executive Director

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Shaun Fernando

Associate Director

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ABOUT SV PARTNERS

When SV Partners was established in 2003, it was with a vision to provide expert, focused accounting services to fellow accountants and lawyers, and their clients. SV Partners aims for the continued pursuit of excellence in service delivery and workplace satisfaction.

We deliver superior outcomes while respecting our clients, referrers and colleagues, work collaboratively as a team, and focus on exceptional service delivery. We do this by displaying a commitment to being:



Agile

We adapt to the changing needs of our industry and our clients in order to provide the most up to date and effective solutions



Cost Conscious

We understand that each situation is unique and requires timely and cost effective solutions. We offer a free initial consultation and are transparent around potential outcomes and costs



Accessible

With our national presence in metro and regional areas, we have the resources to successfully meet the needs of all engagements, including those across borders



Responsive

We make ourselves available at all times, ready to support and guide at each step. Our solutions are designed to help and we take the time to listen to the needs of our clients and share our knowledge and expertise openly

AGENDA

DAY 1

Time	Topic	Speaker
10:00AM	Opening and Welcome Speech	Michael Carrafa SV Partners
10:15AM	The Changing Role of the Trusted Advisor – Influencing Small Business	Andrew Conway Institute of Public Accountants
11:00AM	Morning Tea Break	
11:30AM	Allocation of professional firm profits – ATO compliance approach & Section 100A	Christopher Hill Australian Tax Office
12:15AM	Debtor Management for Professional Fees	Lauren Byrnes SmartFee
12:45PM	Lunch Break	
1:30PM	Insolvency Q&A	The SV Partners Team
2:15PM	Small Business CGT Concessions: Selected Issues	Andrew Henshaw Velocity Legal
3:00PM	Afternoon Tea Break	
3:30PM	Special Disability Trusts	Luke Marshall KDM Financial & Estate Planning
4:15PM	My Offshoring Journey	Craig Allen The Remote Accountant
5:00PM	Break	
6:00PM	Dinner	

AGENDA

DAY 2

Time	Topic	Speaker
7:00AM	Breakfast	
9:00AM	Break	
9:30AM	Commercial Property Market Update	Patrick Brady and Joshua Ruzzier WBP Group
10:15AM	Acquire, Merge or Exit – Tips, pitfalls, and what to look out for depending on your stage of career / practice lifecycle	Justin Mastores Rees Group
10:45AM	Morning Tea Break	
11:15AM	FY 24 Economic and Market Outlook	David Robertson Bendigo and Adelaide Bank Ltd
12:00PM	Business Valuations for Small to Medium Enterprises	Victoria Wheeler and Joshua Wheeler Munday Wilkinson
12:45PM	Thank you and closing speech	Michael Carrafa SV Partners
1:00PM	Lunch	

ACCOUNTANTS FORUM 2023

SPEAKERS



Andrew Conway
Chief Executive Officer
Institute of Public Accountants



Christopher Hill
Director | Private Wealth
Case Leadership
Australian Taxation Office



Lauren Byrnes
Relationship & Development Manager
SmartFee



Shaun Fernando
Associate Director
SV Partners



Michael Carrafa
Executive Director
SV Partners



Tim Brace
Director
SV Partners



Andrew Henshaw
Managing Director
Velocity Legal



Luke Marshall
Senior Partner
KDM Financial & Estate Planning

ACCOUNTANTS FORUM 2023

SPEAKERS



Craig Allen
CEO & Founder
The Remote Accountant



Patrick Brady
Executive Director
WBP Group



Joshua Ruzzier
State Director Commercial Valuations
WBP Group



Justin Mastores
Managing Partner
Rees Group



David Robertson
Chief Economist, Head of
Economic and Markets Research
Bendigo and Adelaide Bank Ltd



Victoria Wheeler
Director
Munday Wilkinson



Joshua Wheeler
Director
Munday Wilkinson

ACCOUNTANTS FORUM 2023

SPONSORS



CT Group is a national market leader in IT Consultancy and Support. We provide reliable, innovative and effective technology solutions and support to the professional services sector. We pride ourselves in our ethos of providing true and honest advice that will deliver long term added value to our clients.

We don't just keep you up to standard, we set the standard through our dynamic suite of ever-evolving services that drive efficiency, ensure security and business continuity. For more information, visit ctgroup.com.au.



JAMES HEY

Director

James Hey is the most recent member to join the team of Directors at CT Group. James started with CT Group as State Manager in 2020 and first employee on the East Coast tasked to build the CT Group national footprint. Over the past 15 years James has built a very well-rounded body of experience working across the Legal and Financial Industries.

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RILEY MURPHY

Client Solutions Manager

Riley Murphy is the Client Solutions Manager at CT Group. Having started with the business in 2022, Riley brings a wealth of experience in the financial services sector. Riley has a strong background in accounting and auditing, having previously worked with Seamless SMSF prior to commencing at CT Group where he was a member of their auditing team. Riley heads up the development of CT Group's Victorian business, focusing on the financial and legal markets. Riley's background in auditing and finance, with an underlying focus on strategic partnerships, relationships, & efficiencies through IT and technology adoption, enables him to help accounting and legal firms alike in achieving their long-term goals and strategies.

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KDM FINANCIAL & ESTATE PLANNING



Our mission is to use our knowledge and experience when helping individuals and businesses through the complex maze of wealth creation, superannuation, personal insurance and risk management.

We help you set long term, holistic goals so you can safely build a legacy for your family. Our team's commitment to lifelong education and innovation, provides us with the experience, qualifications and systems necessary to provide professional, customised advice.



KRIS MARTIN

Managing Director

Kris Martin is the Founder and Director of KDM Financial and Estate Planning. He has a strong background in advice and a deep commitment to helping clients achieve their financial goals. Kris is Chartered Financial Planner, holds a Bachelor of Business and an MBA from the University of Queensland – Kris' main focus at KDM is practice growth, both organic and via acquisitions.

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JOEL BULLIMORE

Senior Financial Advisor

Joel is a Senior Adviser at KDM Financial and is passionate about helping his clients achieve their financial goals. With over 10 years of experience in the financial services industry, he offers a holistic service to his clients which include Superannuation, Retirement Planning, Investments, SMSF Advice and Personal Insurance.

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LUKE MARSHALL

Senior Partner

Luke is an experienced Financial Planner with a demonstrated history of helping every day Australians achieve their financial goals. By fostering a strong and lasting professional relationship, based on mutual trust and respect, Luke can provide you with the information and tools necessary to manage Aged Care, Estate Planning and Estate Administration.

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svpartners.com.au

MUNDAY WILKINSON



Munday Wilkinson is one of Melbourne's first Chartered Accounting firms dedicated to solely providing business valuation, forensic accounting services and litigation support. Established in July 2000, the business has operated for over 23 years and issued thousands of expert reports that have been used for family law, commercial litigation, shareholder disputes, succession planning, CGT purposes and more.



VICTORIA WHEELER

Director

Victoria is recognised by CAANZ as both a Business Valuation Specialist and a Forensic Accounting Specialist. She has over 20 years of experience in public practice and commerce, and has specialised in forensic accounting since 2015. She is the in-house go-to resource on the current hot topics in valuations, and has appeared as an expert in multiple legal jurisdictions. Victoria prepares expert reports for all services on offer, and is most at home when preparing valuations as she derives great satisfaction working with referrers to establish an objective value for businesses.

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JOSHUA WHEELER

Director

Joshua is recognised by CAANZ as a Business Valuation Specialist. He has over 15 years of experience in public practice and commerce, and has specialised in forensic accounting since 2019. He is the firm's go-to resource for commercial litigation matters, preparing quantification of loss reports for multiple legal jurisdictions due to his keen understanding and insights on various industries. Joshua prepares expert reports for all services on offer, and is most at home when helping parties come to a resolution for their matters.

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SMARTFEE



SmartFee allows businesses to access professional advice when they need it, not just when they can afford it. SmartFee removes the stress of paying for large invoices by providing an option to pay fees in easy to manage, monthly instalments over 3 to 12 months, easing cash flow pressure for businesses.

SmartFee assists businesses and individuals who would like to access professional advice from their accountant or lawyer and pay their invoices over a manageable monthly instalment plan.

SmartFee was founded by accountants, so we understand the professional services industry and appreciate the challenges that professionals and their clients face. We strive to deliver an understanding and stress free borrowing experience by providing our service with a human touch. Clients value our personalised approach as they know they can pick up the phone and speak to a real person, every time and our team is always available to assist.



LAUREN BYRNES

Relationship and Development Manager

Lauren has a demonstrated history of working in the financial services industry. Skilled in Management, Team Leadership, Risk Management, Business Development, and Due Diligence. Lauren is a strong business development professional with a Diploma of counselling focused in Child & Youth and Family & Relationship counselling from Jigsaw Education Group.

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THE REMOTE ACCOUNTANT



The Remote Accountant is a boutique offshoring company dedicated solely to the Australian market. We specialise in finding highly skilled staff from the Philippines and matching them with the right accounting practices. Through our proven accounting and offshoring expertise, we hold each client's hand through the offshoring process and advise them on how to manage a remote team successfully.



CRAIG ALLEN

CEO and Founder

Craig Allen is a multi-faceted accountant and business consultant with over 30 years of experience. He started his public practice, Craig Allen & Associates, in 1988.

As one of the original groups of reviewers for CPA Australia's quality assurance program, he now helps accounting firms meet quality standards through his consulting business, Quality Assurance for Accountants.

In 2017, he started forming an offshore team from the Philippines to resolve staffing issues and the apparent skills shortage in Australia. He now employs five remote staff in his public practice. Through his offshoring experience, he launched his own boutique offshoring company, The Remote Accountant (TRA).

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VELOCITY LEGAL



Velocity Legal are a boutique law firm focused on private businesses, business owners and family groups.

We are proud to have built a culture that puts our values at the forefront of everything we do.

We're specialists, going from strength to strength. We speak the same language as our clients and distil complex issues to create clarity.



ANDREW HENSHAW

Managing Director

Andrew acts for a diverse range of private businesses, high net-wealth individuals and family groups. He specialises in business structuring, tax disputes and complex tax issues.

Andrew is passionate about leading by example, getting wins for his clients and solving difficult legal issues. Andrew holds a Bachelor of Commerce and a Bachelor of Laws from Monash University, a Masters of Law from the University of Melbourne and is a Chartered Tax Advisor.

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WBP Group is one of Australia's largest property valuation and advisory firms, established in 1992 with an extensive national network throughout Victoria, New South Wales, Queensland, Western Australia and South Australia. After more than 30 years, WBP Group continues to demonstrate a breadth of experience, expertise and commitment to providing industry-leading client experiences.

We have a team of 140 qualified valuers who undertake 700 – 800 valuations per day using industry-leading mobile technology to deliver accurate independent property advice to a variety of clients, from leading financial institutions to the consumer.



PATRICK BRADY FAPI, Dip. Ed., MRICS

Executive Director

As a founding partner, Patrick's vision and drive has been instrumental to WBP Group's growth since it was established in 1992. WBP Group is now one of the largest privately owned valuation and property advisory companies in Australia, with offices in each state, an expanding regional presence, and team members exceeding 250 across the country.

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JOSHUA RUZZIER B. App Science (Property and Valuations)

State Director Commercial Valuations

As a Certified Practising Valuer, Joshua effectively balances undertaking an average of 50 jobs per month, with leading the Commercial team in Victoria. His breadth of experience includes valuations for residential developments, industrial, retail and commercial properties, and specialist properties such as shopping centres, telco towers, and mixed-use development sites.

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svpartners
specialist accountants & advisors

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THANK YOU

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