

Complex Tax - Consulting

Capability Statement



not your average **Bean** counters

UHY Haines Norton Brisbane
99 Mary Street
GPO Box 2876
Brisbane QLD 4001
t: 07 3210 5500
f: 07 3229 6174
e: brisbane@uhyhn.com.au
w: www.uhyhnbrisbane.com.au

Our Firm

UHY Haines Norton is a national association of independent firms that have come together to create a successful approach to business. We have highly experienced and specialised teams working in our offices in Brisbane, Sydney, Melbourne, Adelaide, Canberra, Perth and Busselton.

UHY Haines Norton Brisbane has 6 partners and over 50 staff providing both general and specialist accounting and consulting services.

The Complex Tax section of the firm has grown considerably over the last 10 years. These specialist skills, combined with our understanding of small to large businesses, enable us to provide reliable, efficient and quality solutions to our clients' taxation needs.

Our Approach

We believe the key to giving the right type of complex taxation advice is for us to understand your business. At UHY Haines Norton, we understand the issues relevant to small to medium businesses and have the specialist complex taxation skills to ensure the right result.

To understand a business we need to identify the drivers of that particular business. Depending on the requirements of the advice and the level of complexity, we will;

- Meet with you to get a detailed brief on the issues and get a full understanding of all the facts;
- Request further information relevant to the matter;

- Clarify any questions we may have based on the facts and information provided;
- Provide you with our advice;
- Discuss with you the outcomes of that advice and options available to you to minimise your tax position along with any other matters that may have come to our attention.

All of these steps are important and enable us to give you a “Complete Solution”;

- We will only provide you with advice when we have all the facts;
- We will advise you if we believe there are better outcomes outside the scope of your question;
- We will consider related commercial and taxation matters that you should consider;
- We will understand the commercial imperatives that drive your business. Taxation is important but rarely a driver.

At UHY Haines Norton we consider communication to be an essential ingredient for the completion of a reliable engagement. All parties involved in the matter are kept informed throughout the process to ensure any queries are resolved quickly and key issues are identified early on in the process. Each client/referrer is assigned a lead partner to manage the relationship and ensure communication flows freely.

Often when a complex taxation matter is required it needs to be completed in a timely manner. We are more than happy to commit to a fixed timeframe for the completion of engagements.

Our Experience

UHY Haines Norton Brisbane has two partners that specialise in Complex Taxation, Michael Garrone and Bill Charlton. The availability of two lead partners to undertake complex taxation assignments means we can structure our resources to meet your deadlines.

We have provided advice in complex taxation matters which include;

- Business Structuring
- Complex Restructures
- Business Investment
- Management Buy-out's
- Long Term Incentive Plans & Employee Share Schemes
- Business Sale/Purchase
- Capital Gains Tax
- Due Diligence for Initial Public Offerings (IPO)
- Succession Planning
- Estate Planning
- Tax Consolidations, Demergers & Scrip for Scrip
- International taxation issues
- Self Managed Superannuation
- Share Buy Backs
- Compliance Reviews
- Tax Audits, Objections & Private Rulings
- GST

Michael Garrone

Michael Garrone has over 12 years experience within the profession and acts as the firm's Complex Taxation Consulting Partner. These have included the areas of the Capital Gains Tax Small Business Concessions, Tax Consolidations, Complex restructures, International Taxation, Self-Managed Superannuation and tax due diligence reports of company's for public listing.

Bill Charlton

Bill Charlton is the managing partner of the firm and has over 25 years of experience in the profession. This experience has covered implementing Long Term Incentive Plans, Management Buy Outs, Complex restructures, Family Law Taxation, along with a variety of Income Tax and Capital Gains Tax matters.

Industries

Michael and Bill have undertaken complex tax assignments across a wide range of industries including:

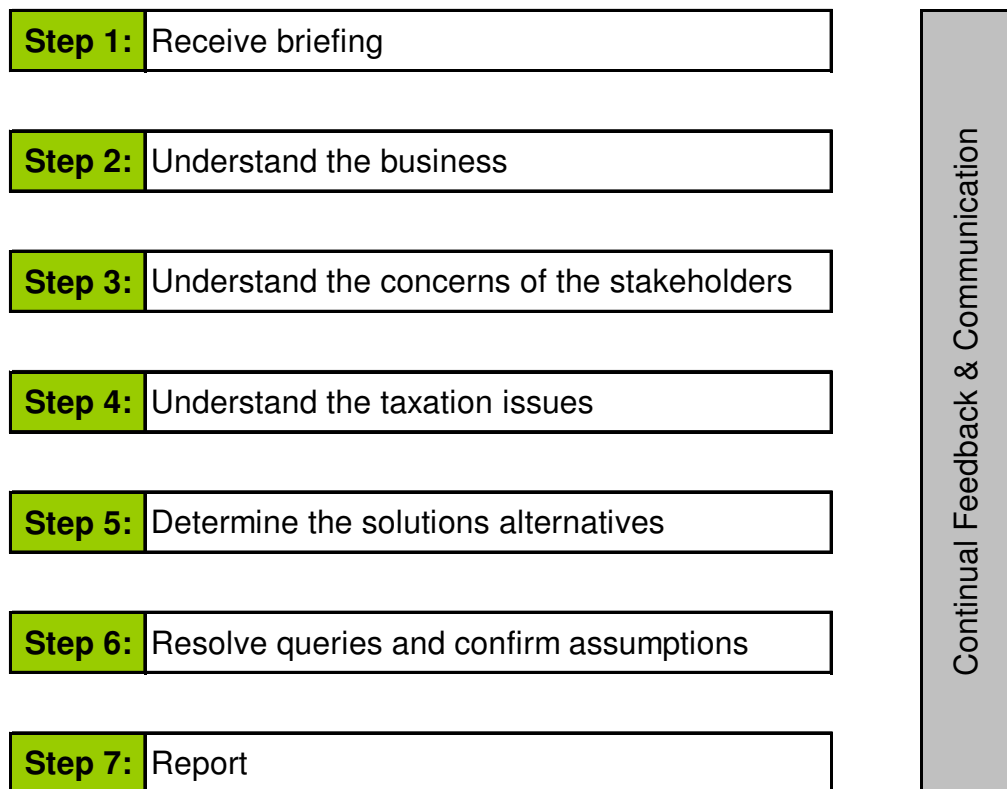
- Building & Constructions
- Manufacturing
- Legal & Professional Services
- Medical
- Information Technology
- Wholesale & Distribution
- Hospitality
- Property Development
- Service industries
- Property Development
- Primary Production
- Retail
- Trucking & Freight
- Real Estate

Other Partners & Staff

The other partners and staff of the firm, and the national association, add to the experience and specialist skills of Bill and Michael to ensure we have an understanding of the issues relevant to most businesses.

Our Process

The basic steps of our complex taxation engagement process are as follows:



We have devoted considerable time to develop tools, systems, training and procedures to ensure each taxation assignment undertaken by our office is completed efficiently and effectively.

We provide personal involvement at partner level – at every step in the process.

We do not accept the first or easy answer, and always seek to find the best solution for your business and the stakeholders.

Contact Us

If you have a matter that we can assist with, please do not hesitate to contact Michael Garrone or Bill Charlton.

99 Mary Street
GPO Box 2876
Brisbane QLD 4000
Phone: (07) 3210 5500
Fax: (07) 3229 6174

Michael Garrone

Direct Line: (07) 3210 5533
Email: m.garrone@uhyhn.com.au

Bill Charlton

Direct Line: (07) 3210 5530
Email: b.charlton@uhyhn.com.au

UHY Haines Norton Brisbane
99 Mary Street
GPO Box 2876
Brisbane QLD 4001
t: 07 3210 5500
f: 07 3229 6174
e: brisbane@uhyhn.com.au
w: www.uhyhnbrisbane.com.au



not your average **Bean** counters