



Government of **Western Australia**  
Department of **Finance**



**Contract Number:** CUA AFA2018

**Last Updated:** 8 May 2024

**Document number:** 02890762

# Contractor Profiles

Audit and Financial Advisory Services  
(CUA AFA2018)

**Category E – Financial, Accounting and  
Taxation Advisory Services**



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## 2020 Global Business Consultants



Contact Name		ACN	ABN
Bruce Donald		096 008 132	71 096 008 132
Phone	Fax	Address	
08 9420 2023 08 9485 2020	08 9485 2030	Suite C1, 118 Railway Street WEST PERTH WA 6005	
Email		Website	
<a href="mailto:bruce@2020global.com.au">bruce@2020global.com.au</a>		<a href="http://www.2020global.com.au">www.2020global.com.au</a>	

### About Us

2020 Global is a multi-disciplinary consultancy practice that maintains high levels of client focus and business ethics. As consultants we ask the right questions, find the answers and can implement solutions across organisations. 2020 Global commenced in 2001 and provides a whole of business service, from analysis to solutions and support and has an experienced business consultancy team that is knowledgeable, curious, energetic and solution-driven.

We assess, we advise, we do.™

### Skills, Experience and Services

The team at 2020 Global has the knowledge and experience in providing financial advisory services to WA State Government agencies, including:

- Financial statement preparation and analysis.
- Development of FMM, accounting policies and procedures.
- Preparation and lodgement of SIMS data for Treasury reporting.
- Accounting advice including preparation of Accounting Standards technical papers.
- Taxation advice, return preparation and lodgement – FBT, GST and BASs.
- Registered Tax Agents.

### Industry Certifications and/or Qualifications Relevant to the Category

Certified Practising Accountants, Chartered Accountants, Certified Internal Auditors, Certified Fraud Examiners, Certified Risk Management Advisers, Chartered Taxation Adviser, Registered Tax Agents.

### Industry Partners or Affiliations

- Institute of Internal Auditors
- Institute of Chartered Accountants – ANZ
- CPA Australia
- Association of Certified Fraud Examiners
- FINSIA

## ACIL Allen Consulting



Contact Name		ACN	ABN
John Nicolaou		102 652 148	68 102 652 148
Phone	Fax	Address	
08 9449 9616 08 9449 9621	08 9322 3955	Level 12, 28 The Esplanade PERTH WA 6000	
Email		Website	
<a href="mailto:j.nicolaou@acilallen.com.au">j.nicolaou@acilallen.com.au</a>		<a href="http://www.acilallen.com.au">www.acilallen.com.au</a>	

### About Us

ACIL Allen Consulting is a full service economics and strategy advisory firm, with a strong history of delivering bespoke advisory services to Western Australian government agencies and private sector organisations. The firm prides itself on its independence, professionalism, analytical rigour, and the practical nature of our advice. Our expertise is centred on the delivery of tailored economic and financial modelling, evidence-based policy advice and information to support decision making. As a national firm we have access to an unparalleled depth of expertise across a range of sectors.

### Skills, Experience and Services

ACIL Allen Consulting provides economic modelling and financial modelling services. We do this through tailored advice, the use of a sound evidence base, and in depth engagement with clients throughout all stages of the engagement. Our modelling services include economic impact assessment modelling, cost benefit analysis modelling, input output modelling, discounted cash flow modelling, and multi criteria assessment modelling. Our State Government experience extends across agriculture, regional development, mining, petroleum, energy, electricity, transport, tourism and macroeconomics. Our modelling is used to support investment, decision making and business cases.

**Note: Financial Modelling and Financial Statement Analysis only**

## AEC Group Pty Ltd



Contact Name	ACN	ABN
Jayde Vine	087 828 902	84 087 828 902
Phone	Address	
07 3831 0577	Level 2 580 Hay St PERTH WA 6000	
Email	Website	
Reception@aecgrouppltd.com	<a href="http://www.aecgroup.com.au">www.aecgroup.com.au</a>	

### About Us

AEC specialises in innovative and evidence based analysis to inform decision making. We apply our core technical disciplines of economics, finance, market research and visual communication with experience in a broad range of industries to ensure our clients receive the best information and market knowledge advice to inform insightful and practical decisions and solutions. We have the capability and experience to assist clients transform ideas and strategies into successful business outcomes. We consider local matters within the regional context and apply global knowledge and experience.

### Skills, Experience and Services

AEC has extensive financial modelling expertise and capability, having developed hundreds of bespoke models for a range of public and private sector projects. We have also developed an array of in-house models ranging from costing and pricing assessments, financial feasibility assessments, business financial projections, corporate overhead allocation mechanisms, funding allocation assessments, and plant and fleet hire rate models. AEC has undertaken considerable financial modelling work on behalf of state and local governments across Australia. We are able to develop models from scratch to meet a desired purpose, as well as leverage off our modelling suite of products to assist in project and policy evaluations and enable informed decision making on process improvement and financial management.

**Note: Financial Modelling only**



Contact Name		ACN	ABN
David Taylor		009 374 001	39 009 374 001
Phone	Fax	Address	
08 9278 5000	08 9278 5099	Level 15, 221 St. George's Terrace PERTH WA 6000	
Email		Website	
<a href="mailto:david.taylor@aotconsulting.com">david.taylor@aotconsulting.com</a>		<a href="http://www.aotconsulting.com.com">www.aotconsulting.com.com</a>	

## About Us

AOT Consulting Pty Ltd is a professional services firm established in 1989 to provide independent commercial, financial, audit, risk, management and technology consulting services.

As an independent professional services firm, we have specifically designed our professional services to assist clients at different stages of an initiative's lifecycle, from conceptual and strategic planning stages through to the implementation of initiatives and beyond. Our independent advice allows the outcomes to be defined based on the business requirements, giving a totally unbiased service.

Since commencing business we have undertaken over 3,000 consulting projects, most of which have been for government agencies.

## Skills, Experience and Services

AOT Consulting Financial Advisory Services assist clients at various stages of an initiative's lifecycle.

The financial advisory services provided is wide and varied according to the stage of an initiative. Financial modelling services for example would often be provided during the early stages of an initiative such as developing a business case and assessing options, preparing budget forecasts with appropriate treatments, or undertaking reviews to compare models. For complex data analysis, we make use of contemporary approaches such as infographics and geo-modelling to succinctly present complex data sets. Financial advisory can also be provided at further stages such as quantifying benefits, quantifying risk, assessment demand patterns and so on. During strategic sourcing projects financial advisory services are also applied to consider sourcing options, undertaking financial assessments, and due diligence.

Business process reviews, modelling and enhancements is another area where financial advisory services are provided, especially if business processes are required to be quantified.

From a program, project and transition management perspective financial advisory services are also applied to resource planning, budget planning and monitoring, and reporting. Similarly, financial advisory services are provided to assist with change management initiatives.

In the context to the Audit and Financial Advisory Services CUA, the scope of professional consulting services include:

- **Financial Modelling:** the services provided include but are not limited to the development of financial models to support financial forecasting and analytics, including financial model reviews, advice and design.

- **Financial Statements Analysis:** the services provided include but are not limited to providing support and advice on the interpretation of financial statements and related data that would assist Customers in their financial planning, resource management and decision-making.
- **Development of Accounting Policies and Procedures:** the services provided include but are not limited to advising on the formulation and implementation of accounting policies and procedures in accordance with the requirements of the FMA.
- **Accounting Advice:** the services provided include but are not limited to providing advice on the accounting treatment of large transactions, budget and cash flow management and advice on management models for facilities.

## Industry Certifications and/or Qualifications Relevant to the Category

AOT Consulting holds the following members and qualifications relevant to financial advisory services:

- Association of Certified Chartered Accountants (ACCA).
- Memberships in Institute of Internal Auditors (IIA).
- Memberships in Risk Management Institution of Australasia (RMIA).
- Memberships in Australasian Evaluation Society (AES).
- Memberships in Chartered Institute of Procurement and Supply (CIPS).
- International Association of Facilitators (IAF).
- ISO9001 Accredited (BVQi).

Consultants hold a combination of BSc (Hons) Degree in Applied Accountancy; Masters of Commerce (International Business); Bachelor of Liberal Studies (Sociology and Psychology); BSc in Biochemistry; Bachelor of Commerce, Majoring in Accounting and Human Resource Management; and Postgraduate studies in Computing and ICT.

## Industry Partners or Affiliations

To maintain a policy of independence, AOT Consulting does not have any partnerships or affiliations. The services provided are completely independent of other parties.

## APV Valuers & Asset Management



Contact Name		ACN	ABN
David Edgerton		089 058 775	236 984 72195
Phone	Fax	Address	
08 6323 2338	07 3221 8409	Suite 83 50 St Georges Terrace PERTH WA 6000	
Email		Website	
<a href="mailto:david@apv.net">david@apv.net</a>		<a href="http://www.apv.net">www.apv.net</a>	

### About Us

APV provides assistance to government departments and entities in resolving complex and sensitive property related issues to satisfy audit compliance together with providing specialist valuation, asset management and asset accounting services for a wide range of organisations and sectors

Our services include:

- Asset accounting valuation and depreciation methodologies, compliance reviews
- Customised training and professional development: asset accounting and asset management.
- Asset management
  - Asset Register development –
  - Level 2 data condition data collection – to be used in developing 10 year asset management plans and frameworks
- Fair Value and Insurance valuations including determination of key figures and disclosures for the financial statements.
- Provision of DIY valuation software and associated training

### Skills, Experience and Services

APV is recognised nationally as the leading experts in public sector assets. APV are extremely proud of an unblemished record over the past 25 years with no financial reporting valuations ever resulting in an Audit Qualification.

We have invested significantly in ensuring our methodologies are up to date and fully compliant and that our valuations will satisfy audit.

No other firm can offer the experience and capability that we can. This is clearly evident through the experience of our team, the breadth of our state government and public sector experience, size of market share and none of our valuations ever resulting in an audit qualification.

All team members are either fully qualified Registered Valuers, Engineers or CPAs. The combination of this mix enables APV to ensure that all valuations not only reflect the appropriate value but also satisfy all compliance and audit requirements.



## Industry Certifications and/or Qualifications Relevant to the Category

Membership, Affiliation, Accreditation	
<b>APV Valuers &amp; Asset Management</b>	ISO:9001 Quality Management – third party certified since 2009. Our 2013 Quality Management feedback from our clients have averaged above 9 out of 10 for every indicator.
<b>APV Valuers &amp; Asset Management</b>	WALGA preferred Supplier Asset Management Consultancy Services (Contract No. C13_15).
<b>APV Valuers &amp; Asset Management</b>	QLD and NT Local Buy Contract No. Local Buy Contact NO. BUS 252-0615 – Supply of Asset Management Services to QLD Local Governments
<b>APV Valuers &amp; Asset Management</b>	NSW Local Government Procurement Pty Ltd LGP Contract LGP1208-3 Professional Consulting Services.
<b>APV Valuers &amp; Asset Management</b>	South Australia Local Government Procurement Asset Management Services (Contract No. 14-SP-0004).
<b>David Edgerton</b>	Fellow of CPA Australia Member – IPWEA Australia (Institute of Public Works Engineers Australia)
<b>Alfio Ponticello</b>	Registered Valuer – WA (44499)
<b>Lachlan Black</b>	Registered Valuer – WA (44500) API Registered Certified Practising Valuer
<b>Daniel Atherton</b>	Registered Valuer – WA (44501)
<b>Damon Griggs</b>	Registered Valuer – WA (44689) API Registered Certified Practising Valuer
<b>Kurt Baker</b>	Registered Valuer – WA (44942) API Registered Certified Practising Valuer

## Industry Partners or Affiliations

APV regularly collaborates with ASSETIC to provide clients with Strategic Asset Management Plans.

## Assurance Advisory Group Pty Ltd



Contact Name	ABN
Stephen Linden	93 604 951 993
Phone	Address
0448 247 888	Level 11, 251 Adelaide Terrace PERTH WA 6000
Email	Website
<a href="mailto:slinden@assuranceadvisory.com.au">slinden@assuranceadvisory.com.au</a>	<a href="http://www.assuranceadvisory.com.au/">www.assuranceadvisory.com.au/</a>

### About Us

Assurance Advisory Group (AAG) is a Pty Ltd company established in April 2015. We have established offices in Perth, Melbourne and Darwin. We also deliver services to Commonwealth agencies in Canberra.

Our Perth office is resourced on a full-time basis by Stephen Linden (founding director) and Executive Directors, Glenn Stroud and Greg LeGuier. Each of our directors has in excess of 20 years consulting experience in the public sector. We have formal working relationships with subject matter specialists in Human Resources (including OHS, Safety) and Procurement to complement our full-time resources.

We have a strong track record in the delivery of all of the services included in the CUA. We are especially strong in internal audit, probity, risk management, procurement, fraud / forensic investigations, project management and financial accounting. Client industries have included: Health, Education, Transport (including ports, rail), Utilities, Construction, Welfare Agencies, Regulatory Agencies, Local Government.

Our staff have significant experience with, and understanding of, the FMA, Treasurer's Instructions, State Supply Act, Public Sector Management Act and other relevant legislation and policies.

### Skills, Experience and Services

As our name suggests our focus is on providing **assurance** services including, but not limited to:

- Performance Audit
- IS audit
- Assurance training
- Data analytics (we utilise IDEA)

... and **advisory** services including, but not limited to:

- Probity advisory
- Procurement services
- Funding / pricing reviews
- Efficiency reviews, including process and function mapping
- Project reviews and training
- Change management

## Industry Certifications and/or Qualifications Relevant to the Category

Our professional staff hold a range of relevant industry certifications and qualifications including:

- Certified internal auditor
- Certified practising accountant – CPA Australia
- Chartered Accountant – Institute of Chartered Accountants
- Graduate of the Australian Institute of Company Directors
- Fellow of the Governance Institute of Australia
- Risk Management Institution of Australasia

## Industry Partners or Affiliations

We hold a number of affiliations and arrangements with other organisations that enable us to draw upon additional resources and expertise when required.

- Protiviti (a global internal audit, risk and information systems consulting firm); and
- Quantum Consulting (a local boutique consulting firm)

**Note: All except Taxation Services**



Contact Name		ACN	ABN
Kristy Porter Peter Toll		607 899 570	84 607 899 570
Phone	Fax	Address	
08 6382 4966 (Kristy) 08 6382 4714 (Peter) 08 6382 4600	08 6382 4601	38 Station Street SUBIACO WA 6008	
Email		Website	
<a href="mailto:Kristy.Porter@bdo.com.au">Kristy.Porter@bdo.com.au</a> <a href="mailto:Peter.Toll@bdo.com.au">Peter.Toll@bdo.com.au</a>		<a href="http://www.bdo.com.au">www.bdo.com.au</a>	

## About Us

BDO is an accounting network with over 155 partners and directors and 1,200 employees across Australia. BDO offers a wide range of business and corporate advisory services to Government & Public Sector entities. Our service style sets us apart from our competitors in that our service is delivered by an experienced and senior professional team that you will have direct access to throughout the engagement. This enables us to collaboratively plan required work, identify key issues and prioritise your service needs whilst maintaining a cost-efficient price. Our Western Australia office, based in Subiaco, has 21 Partners and 230 employees.

## Skills, Experience and Services

The BDO team have a long history of providing financial, accounting and taxation advisory services to government entities.

Our corporate finance and consulting team provide an extensive range of financial and accounting services. These services include:

- Financial Modelling:
  - Financial model construction
  - Financial model review
  - Project analysis
  - Project feasibility
  - Project valuation
  - Project financing.
- Financial statement analysis;
- Development of accounting policy and procedure;
- Assistance with the preparation of financial statement and Annual Reports; and
- General Accounting Advice

Our Tax Advisory team provide tax advice for Australian and international public, private and Government entities including compliance and consulting services across multiple industries such as Infrastructure, Health, Transport, Mining, Agriculture, Services and Technology

## **Industry Certifications and/or Qualifications Relevant to the Category**

Members of our team hold the following qualifications:

- Chartered Accountant in Australia and New Zealand (CA)
- Chartered Financial Analyst (CFA)
- CA Business Valuation Specialist
- Master of Applied Finance
- Masters of Business Administration
- Graduate Diploma of Applied Finance
- Graduate Diploma of Applied Corporate Governance
- Company Directors Course (AICD)
- Chartered Tax Advisor

## **Industry Partners or Affiliations**

- Chartered Accountants Australia and New Zealand (CAANZ)
- Institute of Chartered Accountants in England and Wales
- CFA Institute
- Australian Institute of Company Directors (AICD)
- Financial Services Institute of Australasia (FINSIA)

## Braxford Consultancy Pty Ltd



Contact Name	ACN	ABN
Gary Gliddon	098 993 821	51 098 993 821
Phone	Address	
08 9368 4982	Suite 4, 66 Mill Point Road SOUTH PERTH WA 6151	
Email	Website	
<a href="mailto:gary@braxford.com">gary@braxford.com</a>	<a href="http://www.braxford.com">www.braxford.com</a>	

### About Us

Braxford can provide a wide range of financial, accounting and taxation advisory services. Our knowledge helps our clients to choose adequate and effective course of actions without compromising on compliance.

### Skills, Experience and Services

Braxford is a small close-knit team possessing extensive range of experience, starting from leading positions in Big 4 firms (Deloitte and PWC), to running of or working in private Accounting and Taxation practices and commercial companies.

Our team members have significant experience providing financial, accounting and taxation advice to wide range of small to mid-tier clients, in both public and private sectors, including community and indigenous organisations.

### Industry Certifications and/or Qualifications Relevant to the Category

- Member Institute of Internal Auditors
- Certified Practising Accountant
- Fellow Chartered Accountant (Au and NZ)
- Certified Information Systems Auditor (CISA)
- Registered Company Auditor

## CorpTax Solutions Pty Ltd



Contact Name		ACN	ABN
Steve Molloy		095 268 358	83 095 268 358
Phone	Fax	Address	
0412 440 768 08 9246 9536	08 9246 9588	23 St Helier Drive SORRENTO WA 6020	
Email		Website	
<a href="mailto:steven.molloy@corptaxsolutions.com.au">steven.molloy@corptaxsolutions.com.au</a>		<a href="http://www.corptaxsolutions.com.au">www.corptaxsolutions.com.au</a>	

### About Us

CorpTax Solutions was formed in 2000 to provide a high-quality, cost-effective taxation compliance and consulting service to public companies and National Tax Equivalent Regime (NTER) participants. CorpTax Solutions has a wealth of experience in assignments dealing with NTER tax issues and are able to respond quickly, without excessive levels of hierarchy. Our experience shows that this approach allows our clients to be serviced with maximum communication and in the most cost effective manner.

### Skills, Experience and Services

Tax effect accounting (TEA) – advised extensively in relation to TEA and prepare TEA models utilising our CATALYST Model that clearly shows clients the process from trial balance to tax note. Taxation Compliance – exceptional tax compliance skills, utilising our CATALYST Tax Model to deliver a product that clearly shows clients the process from input to NTER return. Taxation Advisory –worked extensively on NTER related advisory projects.

### Industry Certifications and/or Qualifications Relevant to the Category

Chartered Accountants Australia and New Zealand, The Tax Institute of Australia, National Tax & Accountants' Association

### Industry Partners or Affiliations

Registered Tax Agent, Registered ASIC Agent




Contact Name		ACN	ABN
Cyrus Patell		006 466 351	84 006 466 351
Phone	Fax	Address	
08 9481 1448	08 9481	Level 5, 45 St George's Terrace	
08 9488 1149	0152	PERTH WA 6000	
Email		Website	
<a href="mailto:Cyrus.Patell@crowe.com.au">Cyrus.Patell@crowe.com.au</a>		<a href="http://www.crowe.com/au">www.crowe.com/au</a>	

## About Us

Crowe is ranked among the top 10 global accounting networks with over 150 independent accounting and advisory services firms in more than 100 countries around the world. Crowe is a leading provider of audit, assurance and consulting services and is committed to impeccable quality and standards.

While our size and international coverage provides clients with a full range of services and top tier levels of expertise, we place great emphasis on the importance of local, quality client service. Our local knowledge and global reach mean our team can work with you to uncover and maximise your opportunities.

## Skills, Experience and Services

Crowe has significant experience in providing financial, accounting and taxation advisory services, including but not limited to financial modelling, financial statement analysis, development of accounting policies and procedures, preparation of financial statements and annual reports, and accounting and taxation advice.

### **Financial Advice**

With extensive expertise, ongoing market relationships and a forward-thinking approach, the Corporate Finance team at Crowe is committed to helping clients withstand their unique business challenges and capitalise on transactional opportunities.

Our advisers will work closely with you at every stage, understanding your needs and acting swiftly yet strategically to satisfy them. Our advisers can assist with customised financial modelling to meet client's needs, perform valuations, provide advice and guidance for transactions services and during mergers and acquisitions, amongst others.

### **Accounting Advice**

Crowe offers a full suite of accounting services for government, from the development and evolution of policies and procedure, to the preparation of financial statements and annual reports, and general accounting advice.

Our experience spans the development and – working with Departments – rolling out model accounting practices for local government agencies through to very specific advice, for example, on managing the transaction value of a large asset acquisition.



### **Tax Advisory**

Crowe Tax Advisory is a team of 120 tax specialists operating seamlessly across Australia and New Zealand, as well as tapping into the extensive Crowe network.

Our local specialist tax advisory group comprises of specialist consultants all of whom are highly trained and have many years of practical experience. The specialist tax advisory group provides services included complex tax consulting assignments across all taxes (Federal & State) including Goods and services tax (GST), other employment taxes including pay-roll tax, superannuation guarantee (SG) and fringe benefits tax (FBT), Research and Development, and Duty.

Crowe has been instrumental in authoring a detailed manual, as well as developing and documenting the detailed processes for conducting prudential tax reviews across all taxes. Our Prudential Audit Manual and related documentation has been adopted by the Crowe group on a national basis. This has been done with a view to ensuring that our clients are well prepared for the inevitable tax audit and to assist with minimising the tax compliance 'risk rating' of our clients. Crowe also provides monthly tax training to accounting firms in Perth to keep them informed of the latest changes in law.

### **Industry Certifications and/or Qualifications Relevant to the Category**

Our Crowe team have professional memberships from recognised professional bodies such as the Institute of Chartered Accountants Australia and New Zealand, Certified Practising Accountants Australia, Institute of Internal Auditors, Information Systems Audit and Control Association, and Certified Tax Advisers with the Tax Institute.

### **Industry Partners or Affiliations**

With affiliations to our global network, Crowe relies on an approach to providing impeccable professional service that brings together teams of experts within each service discipline to act as thought leaders and advisors to the network. These network leaders provide global thought leadership on key issues and opportunities impacting multinational clients as well as set standards and best practices for service delivery.

## Deloitte Touche Tohmatsu



Contact Name		ABN
Janette McGinty		74 490 121 060
Phone	Fax	Address
08 9365 7252 (Janette) 08 9365 7000 (Reception)	08 9365 7001	L9, Brookfield Place, Tower 2 123 St George's Terrace PERTH WA 6000
Email		Website
<a href="mailto:tendersdtt@deloitte.com.au">tendersdtt@deloitte.com.au</a>		<a href="http://www.deloitte.com.au">www.deloitte.com.au</a>

### About Us

#### **Financial Advisory**

The team has a proven track record in developing best practice models. We have a thorough model testing methodology and strict quality assurance process to ensure that our work is of exceptional quality and meets your objectives.

#### **Accounting Advisory**

Our Government Advisory services help Finance Leaders assess their finance strategy and vision, helping to design and implement change to their processes and systems within both central finance function and project areas. The overall efficiency and effectiveness of strategy and processes is improved through driving tailored solutions and changes to the finance function.

#### **Taxation Advisory**

Deloitte offers a broad range of fully integrated tax services, including business tax, transfer pricing, indirect taxes, employment taxes and Research and Development and Government incentives. Our approach combines insight and innovation from multiple disciplines with business and industry knowledge to deliver truly world class service to our clients.

Deloitte Tax has a team of dedicated professionals based in WA and supported by the national and global Deloitte tax practice who can deliver deep knowledge of tax and statutory requirements, as well as a breadth of experience applying them in practice worldwide.

### Skills, Experience and Services

#### **Financial Advisory**

Our services include financial and transactional modelling, model reviews, economic and regulatory modelling and operational modelling. Our model creation and review services are applied in numerous situations including feasibility, project finance, capital planning and analysis, building block, scenario planning and price path planning.

We bring the following to each assignment:

- Creating solutions applying best practice techniques
- Providing rigorous internal quality assurance processes and ensuring models are free from calculation errors

- Testing model capability and logic to provide confidence when making major capital and strategic decisions.

### **Accounting Advisory**

Our differentiation is built around a team with a broad range of experiences enabling us to bring solutions which are both innovative and practicable, with a specific focus on the following three strategies:

- **Finance Organisation** – Finance function effectiveness, benchmarking assessment, financial close labs, finance team workshop, capability maturity assessment, training, review of finance policies
- **Finance Processes** – Review of finance processes and benchmark assessments, secondment of personnel, technical accounting advice, asset accounting, lease accounting, management reporting, planning budgeting and forecasting
- **Finance Systems** – Technology enabled leading practice, reconciliation automation tool, implementation of ERP, automate financial statement preparation.

### **Taxation Advisory**

Deloitte Tax works extensively with Public Authorities and Agencies across Australia on various business National Tax Equivalent Regime (**NTER**), indirect and employment tax issues relevant to the organisations. Our compliance and advisory services include:

- Business tax, including NTER and tax effect accounting
- Tax management consulting (compliance, reporting and risk management for direct and indirect taxes)
- Tax controversy (dispute resolution and litigation expertise)
- Indirect tax (GST, customs, fuel tax)
- Stamp Duty
- Employment Taxes (FBT, Payroll Tax)
- Research and development and government incentives.

Deloitte provides practical tax advice, which combined with our consistent tax compliance framework, instils confidence that a consistent approach is followed and the tax risk management and governance framework of the organisation is adhered to.

Deloitte has representatives on various industry, ATO and Federal Treasury working groups. Accordingly, Deloitte can share insights and leverage networks as required to assist organisations to understand and manage their tax outcomes.

## **Industry Certifications and/or Qualifications Relevant to the Category**

Chartered Accountants, Chartered Tax Advisors, Certified Practising Accountants, Admitted Lawyers.

## **Industry Partners or Affiliations**

Chartered Accountants Australia and New Zealand; Chartered Tax Advisors; The Tax Institute of Australia; Certified Practising Accountants; Concur, OneSource, Blackline.

Contact Name	ACN	ABN
Marius van der Merwe	112 942 373	61 112 942 373
Phone	Address	
08 9480 2937	Ground Floor 50 Colin Street West Perth, WA 6005	
Email	Website	
<a href="mailto:mvdm@drykirkness.com.au">mvdm@drykirkness.com.au</a>	<a href="http://www.drykirkness.com.au">www.drykirkness.com.au</a>	

## About Us

Dry Kirkness was established in 1932 and has grown to become one of Perth's leading boutique accounting firms. In July 2022, Butler Settineri (Audit) Pty Ltd joined with Dry Kirkness to form Dry Kirkness (Audit) Pty Ltd and is now the largest independent provider of audit services in Perth.

We have a reputation of providing assurance and audit services for all types of business entities, including listed and unlisted companies, not-for-profit organisations and self-managed superannuation funds. Using software that enhances our audit services we deliver a comprehensive and cost-effective service to our clients.

As part of the Dry Kirkness brand we are able to access accounting, tax and bookkeeping services that help us perform an efficient and effective audit for your business.

Our partners have all worked in large, multinational accounting firms and bring a deep understanding of business structures, strategy and success. Many of our Partners have international experience they bring to every engagement.

The values we bring to every engagement are to build long lasting relationships with our clients, that we provide a professional outcome and are transparent in our communications with each client. We want to be your trusted advisor, so that you feel able to engage with us on all matters affecting the audit of your organisation.

Audit and assurance services and related corporate work accounts for 50% of the Dry Kirkness group fee base and includes the provision of services to listed companies, local government authorities, not-for-profit organisations, small to medium sized public and private corporations, AFS Licensees, and trust audits for legal practitioners, travel agencies and property related entities.

## Skills, Experience and Services

Our tax and accounting team has extensive experience in providing the following services:

- Financial Modelling
- Financial Statements Analysis
- Development of Accounting Policies and Procedures
- Preparation of Financial Statements and Annual Reports
- Accounting Advice
- Taxation Advice

## Industry Certifications and/or Qualifications Relevant to the Category

- Member of Chartered Accountants Australia and New Zealand;
- Member Governance Institute
- Registered Tax Agent

## Industry Partners or Affiliations

- CT Group Solutions is a dynamic Information Communication Technology service provider that has developed an enviable reputation for the successful delivery of ICT services and solutions across numerous industry sectors. The company offers premium managed services, distinct and secure private cloud hosting, In-depth business analysis through IT consultancy services and maximising information assets with document management solutions. CT Group provides tools for innovation and growth for businesses by minimising downtime, improving efficiencies, all whilst reducing costs. The comprehensive managed services encompasses daily support with a key focus on ICT strategies, roadmap planning, business risk mitigation and senior management reviews. From a consultancy perspective, the organisation focusses on efficiency analysis, benchmark auditing and implementation of innovative solutions.
- Ippolo & Associates solution and service offerings, comprising of Data Analytics, Robotics Process Automation (RPA), Strategic Consulting, Budgeting and Forecasting and Enterprise Resource Planning (ERP), are integral to any Digital Transformation initiative. In providing these service offerings, I&A engages with vendors who offer “best in class” solutions to ensure our clients, large and small, are delivered a solution that fits their specific needs within the budget they have available.
- Caseware is in business to help our customers work more effectively, gain deeper insights and see further along the road that leads to change for the better. We succeed by advancing their success. And we help them drive transformation by designing technology that reflects our deep understanding of what they hope to achieve – and why. As we turn caseware’s purpose into action, every decision is anchored by our core values.
  - Many voices, one team – We welcome people with diverse identities and points of view, knowing that we’ll grow stronger and find better answers when all voices are heard. Our open and inclusive culture encourages everyone to share ideas with honesty, empathy and respect;
  - Innovation with impact – We’re curious by nature and, like our customers, focused on finding creative solutions to business problems. Acting quickly and decisively, we push past boundaries as we evolve our products and services to meet the needs of our customers and their clients;
  - Powered by trust – Our customers count on us to provide intelligently designed products built to exacting standards and backed by expert support. As we strive to exceed their expectations, we earn the loyalty and trust that power our business and help build confidence in the future.

# Ernst & Young



Contact Name		ABN
Bill Scanlan (Economics) Robert Kirkby (Accounting) Karen Dill-Macky (Taxation) Laura Christiaens		75 288 172 749
Phone	Fax	Address
08 9429 222	08 9429 2436	The EY Building 11 Mounts Bay Road PERTH WA 6000
Email		Website
<a href="mailto:eywagov@au.ey.com">eywagov@au.ey.com</a> <a href="mailto:Bill.Scanlan@au.ey.com">Bill.Scanlan@au.ey.com</a> <a href="mailto:Robert.Kirkby@au.ey.com">Robert.Kirkby@au.ey.com</a> <a href="mailto:Karen.Dill-Macky@au.ey.com">Karen.Dill-Macky@au.ey.com</a> <a href="mailto:Laura.Christiaens@au.ey.com">Laura.Christiaens@au.ey.com</a>		<a href="http://www.ey.com">www.ey.com</a>

## About Us

EY is one of the largest professional services firms in WA, operating as part of global firm comprising more than 250,000 personnel. Our services help clients strategically assess, remediate and improve governance and control processes, while also elevating the profile of audit and financial advisory services in identifying and addressing complex risk areas.

Our ability to bring innovative ideas and advisory support, greater technology enablement and broad subject matter experience in complex areas allows us to help clients gain significantly enhanced value from our services.

Our global methodology features:

- A proven, consistent global approach, enabled by technology
- A focus on higher-risk issues with integrated subject matter resources
- Governance and execution protocols with the rigor to drive change
- An emphasis on flexible risk assessment and on continuous communication
- Key performance indicators that drive accountability and performance

## Skills, Experience and Services

We have skills and experience delivering a wide range of financial, accounting and taxation advisory services for our clients including:

- **Public Sector Financial Management:** Including topics such as Value for Money (VFM), functional efficiency and effectiveness and CFO training and support
- **Financial modelling:** The development and / or review of financial models to support forecasting and analytics
- **Financial statements analysis:** We have a comprehensive, integrated assessment process to help clients improve their disclosure effectiveness and compliance with local GAAP and other regulations

- **Development of accounting policies and procedures:** We provide a range of solutions, from quick assessments and analysis of your existing accounting policies to the creation of a completely new and customised accounting manual. We can help you:
  - Maintain accounting and finance policies that remain current and in compliance with necessary rules, regulations and business processes
  - Interpret and apply accounting policies consistently across a consolidated group
  - Develop reporting and processes that are more compliant and consistent
  - Explore and implement leading practices when you adopt new policy positions
  - Consider the needs of internal customers and stakeholders when you implement policy and procedure frameworks
  - Provide deployment and training support for your team
- **Preparation of financial statements and annual reports:** We align our approach with your organisational structure and strategic objectives. Our approach enables us to focus on reporting improvements that are tailored to meet your objectives, providing maximum value for minimum investment. Some of the areas we can assist include:
  - The development of consistent and compliant financial statements based on local Generally Accepted Accounting Principles (GAAP)
  - Reducing company time required to support global statutory reporting through the development of a more efficient financial statement close process
  - Detailed, interactive training of finance personnel on local GAAP requirements
  - Identification of immaterial or unnecessary financial statement disclosures
  - Implementation of a consolidation and reporting process
- **Accounting advice:** Our professionals are deeply experienced and can provide practical, business-oriented insight into industry leading practices. We offer technical assistance to help organisations understand the scope and implications of changing accounting standards, policies and practice. Our professionals provide project management and highly qualified technical knowledge to assess potential impacts, evaluate options and effect sustainable change.
- **Taxation compliance:** We assist clients in meeting their tax obligations through a range of services including Business Activity Statements, Individual Activity Statements, Fringe Benefit Returns, Payroll tax returns and related calculations and data analytics for GST, Customs, Superannuation, PAYG, Fixed Assets and NTER.
- **Taxation advice:** We advise clients on State and Commonwealth tax legislation and its impact on the operation and performance of Customers, and related reporting requirements. Example services includes written advice on structuring and funding and Machinery of Government changes; written advice and/or assistance for ATO Reviews; and formal opinions and stated views on tax technical areas of law.

## Industry Certifications and/or Qualifications Relevant to the Category

Our personnel have a range of certifications, qualifications and professional memberships across an array of relevant professional organisations, including: Chartered Accountants; Master of Business Administration; Registered Company Auditor; Masters of Tax; Registered Tax Agents (Tax Practitioner Board); EY Law – legal practitioners; Certified Public Accountant (CPA); Members of Taxation Institution of Australia (TIA).

## Gresham Advisory Partners Limited (GAPL)



Contact Name		ABN	ACN
Chris Branston		88 093 611 413	093 611 413
Phone	Fax	Address	
08 9213 0290 08 9486 7077	08 9486 7024	Level 3, 28 The Esplanade PERTH WA 6000	
Email		Website	
<a href="mailto:cbranston@gresham.com.au">cbranston@gresham.com.au</a>		<a href="http://www.gresham.com.au">www.gresham.com.au</a>	

### About Us

The Gresham Group comprises four divisions: Corporate Advisory, Debt Solutions, Property and Funds Management. The Gresham Group was established in 1985 and has offices in Sydney, Melbourne and Perth.

Gresham's Corporate Advisory business, Gresham Advisory Partners Limited ("GAPL"), is an Australian owned, leading independent corporate advisory business which serves as a trusted advisor to many of Australia's largest 200 companies, and also works with government and private clients.

From the largest transaction in Australian corporate history, the BHP-Billiton A\$57 billion mining merger, through to every industry and scale of transaction, GAPL has established a reputation for innovative solutions and pro-active development of new approaches and opportunities. Our engagement teams are characterised by significant involvement from senior executives who bring to bear high level experience, judgment and technical expertise.

GAPL is one of the few corporate advisory teams in Australia that is truly independent of any debt, equity underwriting/broking or proprietary trading conflicts. Our independence allows us to provide advice on the most suitable funding parties and transaction structure for each opportunity and ensures we deliver the most advantageous outcome to our clients.

Gresham has strong relationships with both clients and advisors located domestically and overseas. Gresham has been particularly successful in developing long-term relationships with major offshore multinationals based in Europe and the US. These clients, who commonly have few Australia-based executives, rely on Gresham to provide dedicated, local expertise.

### Skills, Experience and Services

GAPL's demonstrated advisory capacity includes:

- Strategic reviews
- Mergers, acquisitions and divestments
- IPOs and capital raising
- Debt structuring
- Corporate restructuring
- Public market takeovers
- Valuations
- General corporate advice

In addition, GAPL is able to draw upon the contacts, relationships and expertise of the wider Gresham Group, including Gresham's international affiliate partners.



## **Industry Certifications and/or Qualifications Relevant to the Category**

GAPL holds an Australian Financial Services ("ASF") Licence. (A.F.S.L. 247113)

Employees of Gresham hold the following memberships:

- Institute of Chartered Accountants Australia
- Certified Practising Accountants Australia
- Financial Services Institute of Australia
- Australian Institute of Company Directors

## **Industry Partners or Affiliations**

The Gresham Group has relationships with the following global industry partners:

- Baird Capital (US)
- BNP Paribas (Europe)
- China International Capital Corporation (CICC) (China)
- China Merchant Securities (CMS) (China)
- Guotai Juanan Securities (China)
- Mizuho Bank (Japan)
- Perella Weinberg Partners (US and UK)
- Somerley Capital (China)



KPMG Australia Partnership,  
KPMG Financial Services Consulting Pty Ltd,  
KPMG Financial Advisory Services (Australia) Pty Ltd



Contact Name	ACN	ABN
	(KPMG Australia Partnership)	
<b>Beth Gould, Account Manager</b>		51 194 660 183
<b>Lance Glare, Account Director</b>	(KPMG Financial Services Consulting Pty Ltd)	
	144 686 046	91 144 686 046
	(KPMG Financial Advisory Services (Australia) Pty Ltd)	
	007 363 215	43 007 363 215
Phone	Address	
<b>08 9263 7151 (Beth)</b>	235 St Georges Terrace,	
<b>08 9263 7218 (Lance)</b>	PERTH WA 6000	
Email	Website	
<b><u>Bgould2@kpmg.com.au</u></b>	<b><u>www.kpmg.com.au</u></b>	
<b><u>Lglare@kpmg.com.au</u></b>		

## About Us

KPMG is a global network of professional firms providing Audit, Tax and Advisory services. Our Western Australian government team has extensive experience delivering audit and financial advisory services across many sectors. Clients call upon us for small discrete engagements through to large complex programs of work; and urgent requests.

We have the capacity and diverse capability to respond to a wide range of needs and have provided advice on financial, accounting and taxation matters across the WA public sector (and the WA market more broadly), tailored to the specific needs and budgets of each client.

KPMG provides services under this Category of the CUA via the KPMG Australia Partnership, KPMG Financial Services Consulting Pty Ltd and KPMG Financial Advisory Services (Australia) Pty Ltd.

## Skills, Experience and Services

Capabilities and services relevant to this CUA:

Financial advisory services, including accounting policy and procedure development, impact assessment and implementation support in accordance with the requirements of the FMA and relevant Accounting Standards and Treasurer's Instructions; preparation and review of financial statements, including the use of KPMG's Accelerated Annual Reporting Model for Government; analysis of financial statements and related data to inform decision-making; training courses and workshops on accounting issues and standards; period close and internal controls process improvement reviews and/or workshops; secondments of qualified and experienced finance personnel; technical interpretation and application support for transactions, Departmental restructures or other complex accounting issues (including Treasurer's Instructions); compliance

gap analyses; accounting treatment advice; budget and cash flow management advice; and financial management model advice.

Financial modelling services across various types of models, such as financial, valuations, operational, analytics, calculators, and decision models. Services include model reviews; model amendment / updates; model builds; and various analytic support services such as open data, big data and information management.

Tax advisory services, including advising on State and Commonwealth taxation matters such as GST, stamp duties, employment taxes, advising on relevant legislative updates and the impact on the organisation; assisting with system and process changes to ensure compliance with tax legislation and ensuring the organisation meets best practice requirements; development or review of relevant reporting requirements; assessing tax reporting systems and processes; assisting with tax audits, risk assessments and data analysis.

## **Industry Certifications and/or Qualifications Relevant to the Category**

Our consultants hold a wide range of qualifications and certifications relevant to this category, including:

- Chartered Accountant (CA-ANZ)
- Registered Company Auditor (ASIC)
- Graduate Diploma in Applied Finance and Investment (FINSIA)
- Masters in Applied Finance and Investment (KAPLAN)
- Chartered Tax Adviser (CTA)

## **Industry Partners or Affiliations**

KPMG has corporate membership of various industry bodies, and many of our consultants hold individual memberships with, or are affiliated to, organisations such as:

- Chartered Accountants Australia & New Zealand (CA-ANZ)
- Association of Chartered and Certified Accountants (ACCA)
- Financial Services Institute of Australasia (FINSIA)
- Chartered Institute of Taxation (England & Wales)
- Indirect Tax Committee, CA-ANZ
- Taxation Institute of Australia
- Australian Institute of Company Directors (AICD)

**Lazard Australia Pty Ltd****LAZARD**

Contact Name		ACN	ABN
Andrew Leyden		649 846 328	18 649 846 328
Phone	Fax	Address	
03 9657 8400	08 9223 0499	Level 53	
0418 808 280		101 Collins Street	
		MELBOURNE VIC 3000	
Email		Website	
<a href="mailto:andrew.leyden@lazardaustralia.com">andrew.leyden@lazardaustralia.com</a>			

**About Us**

Lazard Australia is an independent corporate advisory firm with a team of approximately 20 professionals and offices in Melbourne and Sydney. The Lazard Australia team has extensive experience across a range of sectors, including energy, infrastructure, resources, healthcare, technology, real estate and financial services.

Lazard Australia has a strategic alliance agreement with the Lazard Group, a leading global independent advisory firm, based in New York, and with offices throughout the world. The Lazard Group has a dedicated sovereign advisory group and extensive experience advising Government clients around the world on a range of matters, including debt issuance and restructuring, important policy matters and privatisations.

**Skills, Experience and Services**

Lazard Australia provides a full range of corporate advisory services for corporate and government clients, including merger and acquisition transactions, capital raisings, debt restructurings, privatisations, regulatory reforms, industry structures, competition policy and commercial negotiations. In Australia, our team has a track record of successfully working with the Commonwealth and State Governments, having advised on more than \$90 billion of privatisation transactions over the past 20 years, as well as providing financial and commercial advice on a broad range of other non-privatisation assignments across a range of sectors.

**Industry Certifications and/or Qualifications Relevant to the Category**

Lazard Australia Pty Ltd is an authorised representative (AR no 1289524) of Lazard Pty Ltd (ACN 086 785 622, Australian financial services licence no 245358).

**Note: All services except tax, accounting or actuarial advice and services**

Contact Name		ACN	ABN
Alex Marsden		072 233 204	66 663 324 657
Phone	Fax	Address	
08 9324 1785 03 9882 1600	08 9322 7936	L1 220 St Georges Terrace PERTH WA 6000	
Email		Website	
<a href="mailto:tenders@marsdenjacob.com.au">tenders@marsdenjacob.com.au</a> <a href="mailto:amarsden@marsdenjacob.com.au">amarsden@marsdenjacob.com.au</a>		<a href="http://www.marsdenjacob.com.au">www.marsdenjacob.com.au</a>	

## About Us

Marsden Jacob is expert in financial and economic modelling. We have significant expertise and experience in undertaking financial modelling to support commercial feasibility assessments, cost benefit analysis, and economic and financial impact assessments. We frequently develop financial models to support analysis that include forecasting and analytical components. We have also reviewed and provided advice in relation to financial models prepared by third parties.

Almost all of our project work incorporates some form of financial modelling. Recent experience that specifically focused on financial and commercial modelling includes (but is not limited to) the following:

- Regulation Impact Statement on proposed funding reforms for Heavy Vehicles, 2018
- Cost benefit analysis of proposed reforms to Plumbing industry regulation, 2017
- Financial assessment of the Portland Aluminium Smelter, Confidential, 2017
- Whole-of-Live Costs and Impacts on Prices, Goulburn-Murray Water, 2017
- Alinta Energy Due Diligence, Confidential, 2017
- Energy Storage Feasibility Study, Confidential, 2017
- Snowy Hydro Five Minute Financial Settlements, Snowy Hydro, 2017
- Assistance to power & Water Corporation (PWC), Power & Water Corporation (NT), 2016
- National Disability Insurance Agency – Pricing and policies for Specialist Disability Accommodation, 2016
- Augmentation of Sunbury Recycled Water Treatment Plant, Western Water, 2016
- Bio-solids business case and delivery mechanisms project conducted under the Partnerships Victoria program as a public private partnership (PPP), Barwon Water, 2015
- Business strategy advice, Goulburn-Murray Water, 2015
- Carrapateena Rail Prefeasibility Study, Oz Minerals, 2015
- Depreciated Optimised Replacement Cost (DORC) Valuation, Port of Portland, 2015
- Development of an economic framework for assessing native timber harvesting in the South West of WA, Forest Products Commission (WA), 2016
- Development of Financial Business Models and Tariffs, NT Power Water Corporation, 2016
- Eynesbury / Melton South Recycled Water Scheme, Western Water, 2016
- Independent Review of Business Case, State Owned Corporation, 2016
- Cost Recovery Impact Statement of changes to the Queensland Water Act, Department of Environment and Heritage Protection (2018).

- Levels of Service and Modelling: power and Water Corporation (PWC), NT Power Water Corporation, 2015

## **Skills, Experience and Services**

Economic and financial modelling and financial analysis is a key foundation of Marsden Jacob's work and underpins most of the analysis we produce. Marsden Jacob undertakes analysis for our clients using existing models but more commonly creates bespoke economic and financial models. Bespoke models enable a focus on providing insights that can be used by boards, management and professional staff to support unique investment decisions, facilitate priority setting and inform strategic direction.

Marsden Jacob has extensive experience in developing programs and reviewing commercial feasibility and business cases, both on a financial and economic basis. We make use of cost benefit analysis or economic impact analysis to determine the economic value of a program.

Marsden Jacob has applied knowledge and experience in the development of programs that consider and maximise the full range of financial, social and environmental outcomes (or triple bottom line analysis). We have particular expertise in non-market valuation of particular relevance to business cases that are looking to be underpinned by government funding. Our approach to business cases broadly flows a standard project management process.

Marsden Jacob has significant expertise and experience in the development and assessment of cost recovery programs. We have experience in setting or reviewing fees and charges for government services such as on a user pays or a beneficiary pays system.

## McGrathNicol Advisory



McGrathNicol

Contact Name		ABN
Michael Shanahan		34 824 776 937
Phone	Fax	Address
08 6363 7607 08 6363 7609	08 6363 7699	Level 17 37 St Georges Terrace PERTH WA 6000
Email		Website
<a href="mailto:mshanahan@mcgrathnicol.com">mshanahan@mcgrathnicol.com</a>		<a href="http://www.mcgrathnicol.com">www.mcgrathnicol.com</a>

### About Us

On a daily basis McGrathNicol operate and manage entities in distress. We understand and implement the accounting services required to operate a business.

### Skills, Experience and Services

McGrathNicol has provided accounting services to managed entities including:

- Submission of business activity statements (BAS)
- Management of creditors and debtors;
- Management of working capital; and
- Management of employee entitlements.

### Industry Certifications and/or Qualifications Relevant to the Category

McGrathNicol qualifications and certifications include:

- Graduate Diploma Chartered Accounting

### Industry Partners or Affiliations

McGrathNicol and its staff have an association with the Governance Institute of Australia and Chartered Accountants Australia New Zealand.

## Moore Australia (WA) Pty Ltd

as Agent for the Moore Australia (WA) Partnership of  
Trusts (formerly Moore Stephens (WA) Pty Ltd)  
Moore Australia Audit (WA) Partnership



MOORE. THE NEW BRAND FOR MOORE STEPHENS

Contact Name		ACN	ABN
<b>Greg Godwin</b>		Moore Australia (WA) Pty Ltd as Agent	
<b>Michelle Shafizadeh</b>		009 297 769	99 433 544 961
		(Moore Australia Audit (WA) Partnership)	
		16 874 357 907	
Phone	Fax	Address	
<b>08 9225 5355</b>	08 9225 6181	Level 15	
<b>08 9224 0147 (Michelle)</b>		Exchange Tower	
<b>08 9224 0171 (Greg)</b>		2 The Esplanade	
		PERTH WA 6000	
Email		Website	
<a href="mailto:michelle.shafizadeh@moore-australia.com.au">michelle.shafizadeh@moore-australia.com.au</a>		<a href="http://www.moore-australia.com.au">www.moore-australia.com.au</a>	
<a href="mailto:greg.godwin@moore-australia.com.au">greg.godwin@moore-australia.com.au</a>			

### About Us

Moore Global is one of the world's major accounting and consulting networks, comprising 579 offices of 255 member firms across 114 countries, with more than 2,600 Partners and 28,000 staff servicing clients for over 60 years.

We have access to the Moore Australia National Accounting Technical resource who is also on the Australian Accounting Standards Board, which provides our staff and clients with easy access to technical advice.

#### Moore Australia (WA) Pty Ltd

Moore Australia (WA) Pty Ltd is an audit, accounting, tax and advisory firm providing astute advice and practical solutions, to consistently deliver solid results. With our firm on board, you operate at your best, enabling you to achieve your goals. Moore Australia (WA) has approximately 100 staff including 14 Partners in Audit and Assurance, Corporate Finance, Business Advisory, Local Government Advisory and Tax Consulting.

We have a strong understanding of the Financial Management Act, Treasurers Instructions, Public Sector Management Act, Local Government Act and their related regulations, other relevant legislation and policies.

We have a Partner with approximately 10 years of Executive experience with the Office of the Auditor General in WA who will bring significant value and insight to your financial advisory engagement.

We have been trusted advisors with many businesses, state and local governments and not for profit organisations for nearly four decades, providing advice customised to meet the needs of



our clients. Our success is derived from our ability to understand the challenges that our clients face and provide intelligent solutions. We combine genuine client engagement with astute advice. We offer a wide array of services and have specialist knowledge in many industries and sectors.

## Skills, Experience and Services

The Moore Australia team are highly skilled in providing financial advisory services to government entities. Moore Australia have provided the local government sector with a financial reporting model financial statements for over 25 years. We prepare long term financial plans from 10 to 25 years for many local governments. We also conduct nuts and bolts, budget, management reporting, financial reporting, FBT and tax workshops for local government and CPA Australia as well. Moore Australia financial advisory services include:

- Financial statement, annual report and management accounts preparation
- Development and review of financial accounting and financial management manuals, policies and procedures
- Preparation of SIMS data for Treasury reporting
- Accounting advice including development of accounting policies and procedures and accounting position technical papers
- Project advice and management
- Budgeting and forecasting advice and support
- Asset register development and maintenance
- Economic modelling and economic impact assessments,
- Cost- benefit analysis
- Financial report model financial statements
- Finance organisation including financial management operational reviews, financial management efficiency reviews, benchmarking assessments, secondment of personnel, capability maturity assessments,
- Financial system change-management implementation and reviews
- Mergers, acquisitions, divestments, capital raising, and restructuring advice
- Management of accounts payable and receivable, working capital, employee entitlements
- Taxation advice for superannuation, payroll tax, FBT, GST, BAS, stamp duty, customs, fuel tax, research and development and government incentives
- Tax return preparation and lodgement
- Training and education in the above areas

## Industry Certifications and/or Qualifications Relevant to the Category

- Australian Institute of Management (AIM) – Fellows
- Australian Institute of Company Directors (AICD) – Graduates
- Certified Practising Accountants (CPA) – Fellows, Members
- Governance Institute of Australia (GIA) – Fellows
- Institute of Public Administrators in Australia – Members
- SMSF Auditor with ASIC
- Chartered Accountants Australia and New Zealand (CAANZ) – Fellows
- Registered Company Auditors (RCA)
- Registered Tax Agent

## Industry Partners or Affiliations

Moore Australia (WA) Pty Ltd is a member of both Moore Australia and Moore Global.

## Nexia Perth Pty Ltd



Contact Name		ACN	ABN
Muranda Janse van Nieuwenhuizen		145 447 105	27 145 447 105
Phone	Fax	Address	
08 9463 2463	08 9463 2499	Level 3, 88 William Street PERTH WA 6000	
Email		Website	
<a href="mailto:muranda.jvn@nexiaperth.com.au">muranda.jvn@nexiaperth.com.au</a>		<a href="http://www.nexia.com.au">www.nexia.com.au</a>	

### About Us

Nexia Perth is a part of top 10 National and International network of Accounting firms. We are a full service firm and provide all services, except for Insolvency advice.

### Skills, Experience and Services

Nexia Perth provides Financial, Accounting and Taxation Advisory Services, as per below:

- Financial Advice
- Taxation Advisory Services

### Industry Certifications and/or Qualifications Relevant to the Category

- CAANZ Affiliated Firm
- Registered Tax Agents
- Registered Company Auditors
- Associate Governance Institute Of Australia
- Associate International Institute Of Chartered Secretaries And Administrators
- Member of The Tax Institute
- Member of The Institute Of Internal Auditors

### Industry Partners or Affiliations

We partner with Integral Development, to jointly provide a range of consulting services to the State Government.

Contact Name		ACN	ABN
Michael Palassis, Executive Director (Financial Modelling) & Cameron Palassis, Executive Director (Financial Accounting and Taxation Advisory)		131 116 268	23 970 908 281
Phone	Fax	Address	
08 9476 3144	08 9476 3188	Level 5 160 St Georges Terrace PERTH WA 6000	
Email		Website	
<a href="mailto:mpalassis@paxongroup.com.au">mpalassis@paxongroup.com.au</a>		<a href="http://www.paxongroup.com.au">www.paxongroup.com.au</a>	
<a href="mailto:cpalassis@paxongroup.com.au">cpalassis@paxongroup.com.au</a>			

## About Us

Paxon Group (Paxon) is a leading Australian advisory firm providing innovative commercial and financial advice on projects across Australia. We regularly provide advice on new partnering, financing and development techniques that meet the optimum risk allocation for clients whilst achieving the overall project objectives.

We have over 50 specialist advisers across offices in Sydney, Melbourne, Perth, Brisbane, Adelaide and Darwin. Established over 30 years ago, Paxon has consolidated its position as a market leader in the development of cutting-edge transaction structures that extract development value and secure third-party capital investment.

Paxon has provided briefs to Department Heads, Ministerial Advisors, Ministers and Committees of Cabinet. This high-level experience has provided Paxon with a strong understanding of the level of communication required and the management of sensitivity within a strategic context when providing advice to government.

## Skills, Experience and Services

### *Financial Modelling*

Paxon develops or reviews over 20 financial models for business cases each year. This includes reviewing third-party financial and commercial models to ensure investment or financing decisions are made with the utmost scrutiny. In the past 5 years, Paxon has advised on over 20 complex financial modelling projects with a capital value of over \$50 billion.

As part of this advice, Paxon regularly develops financial models to assess project feasibility, operating positions, Net Present Value and other key project metrics. Paxon has also developed Public Sector Comparator models for many Government infrastructure projects, with Paxon's modelling regularly scrutinised by Treasury, gateway reviewers and other levels of Government.

Other financial modelling we undertake includes development of project finance models to determine funding and financing requirements, recurrent cost and operating models, risk modelling to quantify project risks, and a variety of bespoke financial models tailored to meet individual client requirements.

Paxon has provided financial models for many high-profile projects in WA and nationally including:

- **Smith Street Highgate Build to Rent** – financial modelling for an innovative housing development through the State's first ground lease build-to-rent model for social housing

- **Curtin Exchange Precinct** – financial modelling for the \$450 million Greater Curtin project
- **South West Advanced Manufacturing and Technology Hub** – financial modelling for the establishment of an Advanced Manufacturing and Technology Hub located in the Bunbury-Geographe region
- **Perth Concert Hall Precinct** – financial modelling for the upgrade of the Perth Concert Hall and associated areas
- **Perth Aboriginal Short Stay Accommodation** – financial modelling for a short stay accommodation facility for indigenous people travelling to Perth for medical, cultural, family or personal reasons
- **Perth Museum Boola Bardip** – financial modelling, business case and operating modelling for the new Perth Museum
- **Home of Football Facility** – financial modelling for Football West and the Department of Finance for a new Home of Football for WA
- **Fiona Stanley Hospital** – financial modeling for the \$4 billion Facilities Management and MES PPP for the 800 bed Tertiary Fiona Stanley Hospital
- **Department of Education** – financial modelling and recommendation of a best option to establish a new primary school on two select site options in the Perth CBD.

### ***Financial Accounting***

Paxon offers our government clients a fully outsourced service, including accounting services, financial reporting, review of financial processes and benchmark assessments, planning budgeting and forecasting. We help clients to improve their finance systems and processes for greater efficiency and effectiveness. All financial statements are prepared in accordance with AASB Framework, Treasury instruction and current Office of Attorney General guidelines.

### ***Taxation Advisory***

Paxon provides a full range of taxation advisory for our clients. Our services include advising on public sector clients on business, indirect and employment tax issues such as GST, employment taxes (FBT, PAYG), stamp duties, superannuation, transfer pricing, ensuring compliance with regulations, developing and auditing systems and procedures to ensure best practice, risk assessment and taxation disputes.

## **Industry Certifications and/or Qualifications Relevant to the Category**

Our staff bring a diverse set of skills, experience and qualifications to our clients. All have degree level education and industry certifications including:

- Certified Internal Auditor (CIA)
- Certified Practicing Accountant (CPA)
- Chartered Accountant (CA)
- Masters of Business Administration (MBA)
- Masters of Applied Finance (MAppFin)
- Master of Finance (MFin)
- Juris Doctor
- Diploma of Financial Markets
- Graduate Diploma of Applied Finance and Investment
- Certified Taxation Adviser (CTA)
- Chartered Financial Analyst (CFA)
- Bachelor of Commerce / Economics / Engineering / Nursing / Law / Science
- Chartered Financial Analysts Society, and
- Australian Institute of Project Management (AIPM)

## **Industry Partners or Affiliations**

Paxon partners and staff enjoy membership and affiliations with a significant number of industry bodies and professional associations. Some relevant to this category include:

- Australian Institute of Banking and Finance
- Australian Institute of Management
- Australian Institute of Public Accountants
- Chartered Accountants Australia and New Zealand (CA ANZ)
- Chartered Association of Certified Accountants

- Committee for Economic Development of Australia (CEDA)
- Financial Services Institute of Australasia (FINSIA)
- Institute of Internal Auditors (IIA)
- Property Council of Australia (PCA).
- Securities Institute of Australia
- Taxation Institute of Australia.



Contact Name	ACN	ABN
Adam Christou	108 473 909	27 108 473 909
Phone	Address	
0410 311 263	Level 19 St Martin's Tower 44 St George's Terrace PERTH WA 6000	
Email	Website	
Adam.Christou@protiviti.com.au	<a href="http://www.protiviti.com.au">www.protiviti.com.au</a>	

## About Us

Protiviti is a global consulting firm that helps companies solve problems in finance, technology, operations, governance, risk and internal audit, and has served more than 60 percent of FORTUNE 1000® and 35% of FORTUNE Global 500® companies. Protiviti and its independently owned Member Firms serve clients through a network of more than 70 locations in over 20 countries. In Australia Protiviti is a significant supplier to all Australian and State Governments. The firm also works with smaller, growing companies, including those looking to go public, as well as with government agencies.

Protiviti is a wholly owned subsidiary of Robert Half (NYSE: RHI). Founded in 1948, Robert Half is a member of the S&P 500 index.

We are the largest firm dedicated exclusively to providing independent risk consulting and internal audit services. At Protiviti, internal audit and risk consulting are our business, our primary focus, and our core competency.

We bring highly configurable solutions to our clients. Our clients tell us that what sets us apart is our ability and willingness to structure resourcing solutions specifically to their needs. We bring a combination of dedicated full-time risk professionals, contract talent and global resources to bring cost efficient and highly effective solutions.

Our global network is all part of a single organisation under one ownership structure. This gives us the ability to collaborate, communicate and respond quickly and seamlessly to our clients.

Protiviti has achieved phenomenal success in our 10+ years of business. This has been driven by our focus on being value partners with our clients. We proactively work with management teams to assess, design, and execute risk plans related to their business. When you need us we are there. We share ideas. We tap into our firm-wide resources to bring forward the best solutions.

## Skills, Expertise and Services

Protiviti have the skills and expertise to offer a full suite of professional services under CUA AFA2018. This includes:

- Internal Audits
- Information Systems Audits
- Investigations / Forensic Audits
- Corporate Governance Reviews
- Project Assurance and Advice
- Data Analytics
- Risk Assessments, Risk Management Plans and Risk Reviews
- Financial Assessment Services

- Business process re-engineering and improvement advice
- Probity Audits and Advice
- Procurement, Tendering and Commercial Advice
- Development of Policies and Procedures
- Preparation of Financial Statements and Annual Reports
- Financial Statements Analysis

## **Industry Certifications and/or Qualifications Relevant to the Category**

Our professional staff hold a range of relevant industry certifications and qualifications, including:

- Certified Internal Auditor
- Certified Practising Accountant – CPA Australia
- Chartered Accountant – Institute of Chartered Accountants
- Graduate of the Australian Institute of Company Directors
- Fellow of the Governance Institute of Australia
- Risk Management Institution of Australasia

## **Industry Partners or Affiliations**

Protiviti is one of only 10 Principal Partners of the Institute of Internal Auditors globally.

**RSM Australia Pty Ltd**

Contact Name		ACN	ABN
Amit Kabra		009 321 377	65 319 382 479
Phone	Fax	Address	
0411 674 167 08 9261 9594	08 9261 9111	Level 32 2 The Esplanade PERTH WA 6000	
Email		Website	
<a href="mailto:Amit.Kabra@rsm.com.au">Amit.Kabra@rsm.com.au</a>		<a href="http://www.rsm.global/australia">www.rsm.global/australia</a>	

**About Us**

RSM is the largest mid-tier accounting firm in Australia, with 32 offices, over 80 partners and 1,100 staff. We are part of the RSM International network, the sixth largest audit, tax and consulting network in the world, with approximately 41,000 people in 800 offices across 120 countries.

**Skills, Experience and Services**

Our Financial, Accounting and Taxation Advisory Services professionals deliver the specialized, objective financial advice you need to clearly understand your options, opportunities and exposures. This includes a range of services, for example financial modelling, due diligence, valuations and litigation support to restructuring underperforming businesses. We also offer a range of accounting and taxation advisory services, including accounting standards advice, preparation of financial statements / annual reports and transaction tax and related accounting implications.

**Industry Certifications and/or Qualifications Relevant to the Category**

Fellow/Associate of the Institute of Chartered Accountants Australia & New Zealand (FCA/ACA), Certified Practising Accountants Australia (CPAA), Chartered Accountant Australia & New Zealand (CAANZ) Business Valuations Special Interest Group.

**Industry Partners or Affiliations**

Institute of Chartered Accountants Australia & New Zealand (CAANZ), Certified Practising Accountants Australia (CPAA) and Tax Institute of Australia (TIA).



**Stantons**

Contact Name		ACN	ABN
James Cottrill		144 581 519	84 144 581 519
Phone	Fax	Address	
08 9481 3188	08 9321 1204	Level 2 40 Kings Park Road WEST PERTH WA 6005	
Email		Website	
<a href="mailto:jcottrill@stantons.com.au">jcottrill@stantons.com.au</a>		<a href="http://www.stantons.com.au">www.stantons.com.au</a>	

## About Us

As a Chartered Accounting firm, Stantons together with its affiliates possesses its greatest strength in the area of Financial, Accounting and Tax related matters. Financial, Accounting and Tax services forms the significant part of our core business and passion. James Cottrill our Principal who is both a CA (Chartered Accountant) and CPA (Certified Practising Accountant) leads a team of very experienced Financial, Accounting and Tax personnel in all our engagements.

Stantons takes a leading role in providing Financial, Accounting and Taxation Advisory Services to key industry sectors and in relation but not limited to the following:

- Government entities
- Mining and Exploratory entities
- Not-for-Profit entities.

The provision of a number of services as noted in the experience section below, makes Stantons a “one stop shop” firm for most of our clients.

## Skills, Experience and Services

Stantons and its affiliates has over 40 years of providing the following services:

- Financial Modelling
- Financial Statements Analysis
- Assisting in the development and enhancement of Accounting Policies and Procedures
- Providing sound Accounting Advice
- Auditing of Financial Statements and Annual Reports
- Providing taxation advice from an accounting perspective
- FBT and BAS audit reviews
- Tax accounting treatment advice
- Technical taxation advice and planning (provided through an affiliate).

It is through the ongoing provision of the above services that Stantons continues to be a leading professional consistently being sought by clients. Armed with the highest ethical values, profound standards and evident art of veracity, Stantons professionalism is second to none.

## **Industry Certifications and/or Qualifications Relevant to the Category**

Stantons is a Chartered Accountant-certified organisation, which demonstrates a level of general rigour in our internal process and internal quality assurance (QA) processes. In addition to the organisational certification, across the personnel in the Internal Audit/IT Audit and Risk Consulting area that is responsible for program reviews and at SI the following relevant certifications and qualifications are represented:

- Senior Member Certified Professional Australian Computer Society
- Certified Internal Auditor (Institute of Internal Auditors Australia)
- Certified Information Systems Auditor
- Certified Practicing Accountant (CPA Australia)
- Chartered Accountant
- Master of Economics
- Bachelor of Business
- Master of Business Administration
- Post Graduate Diploma in Management
- Graduate Diploma in Business (Computing Studies)
- Bachelor of Commerce
- Bachelor of Business Administration.

## **Industry Partners or Affiliations**

Stantons is an affiliate of the Russell Bedford International (RBI) group of companies, which is a global network of accounting/auditing firms, and tax and business advisors. In Australia, specialist taxation advice and services can be provided through our Tax and financial planners affiliate; Marsden-Stantons. At an international level, the network is represented by some 290 offices in more than 100 countries, including offices in each State in mainland Australia.

Through the RBI network, Stantons shares and has access to a national and international network of expertise, training materials and resources. Stantons actively participates in the network through regular representation and delivery of presentations at national and international RBI conferences and training sessions. Stantons also has a strategic partnership with the RBI affiliate based in Adelaide, Lee Green and Associates, including a collaborative partnership between the organisations based in Darwin.

## Ubique Partners



Contact Name	ACN	ABN
Luke Parsons	27 602 781 653	27 602 781 653
Phone	Address	
0417 045 520	158A Wilding St DOUBLEVIEW WA 6018	
Email	Website	
<a href="mailto:luke@ubiquepartners.com">luke@ubiquepartners.com</a>	<a href="http://www.ubiquepartners.com">www.ubiquepartners.com</a>	

### About Us

Ubique Partners, was founded in 2017 by Luke Parsons and Toby Browne-Cooper as a multidisciplinary business advisory practice to service both public and private sector clients. Ubique Partners is a multidisciplinary advisory practice with a focus on strategy, commercial and financial advisory and assisting clients address their most complex challenges.

The core expertise of the Ubique Partners team lies advising public sector clients or, where the engagement is a transaction (e.g. a PPP), advising private sector clients on complex public sector projects.

We are drawn from 'top tier' professional advisory backgrounds spanning:

- Partner and director level positions in 'big 4' advisory firms
- Director level positions in leading investment banks, and
- Partner and senior associate level positions in top tier law firms.

Our team also brings relevant experience working in senior positions in the public sector and leading global corporate enterprises.

Ubique Partners team members and business partners have significant experience in innovation and managing disruptive change from emerging technologies. This is one of our key differentiators and innovation is a core objective of Ubique Partners.

### Skills, Experience and Services

The Ubique Partners Team consists of professional advisers with significant financial commercial, strategy, tax and legal advisory experience, and former CFOs, CIOs and CEOs of large corporates – providing a diverse mix of experiences and qualifications relevant to the Financial, Accounting and Taxation Advisory services and sub-services.

Key clients served include: ASX listed entities; Government agencies and Government Trading Authorities; Private sector clients; Financial institutions. Ubique Partners offers the following Financial, Accounting and Taxation Advisory services:

- Financial
  - Financial modelling – design and development
  - Financial statement analysis – review, ratio analysis and financial capacity analysis
  - Development of Accounting Policies and Procedures – Team members include former CFOs
  - Preparation of Financial Statements and Annual Reports - Team members include former CFOs

- Accounting advice - Transaction structuring, cash flow management advice
- IT systems (Accounting) strategy and implementation advice
- Tax advice - GST advice, Income tax / Tax equivalence, FBT and other indirect tax advice. Transaction structuring advice and stamp duty advice (eg PPPs and outsourcing).

## Industry Certifications and/or Qualifications Relevant to the Category

Relevant Ubique Partners team members hold their Chartered Accountant certification from the Institute of Chartered Accountants and practicing certificates from the Institute of Chartered Accountants with respect to tax.

Ubique Partners team members hold a combination of bachelor and master levels degrees in commerce, economics, public infrastructure and law and many have completed their MBAs and the Company Directors course (AICD).

## Industry Partners or Affiliations

Ubique Partners and its specified personnel have the following affiliations:

- Members / Fellows of the Institute of Chartered Accountants
- Australian Institute of Company Directors
- Australian Computer Society & IT Governance Institute
- Admitted to practice in the Supreme Court of Western Australia and other Australian jurisdictions.

Industry partners of Ubique Partners include **expertential.com** (process mapping, quality assurance, training and workflow management for professional services), and **Whytes Chartered Accountants** (we enhance our organisational strength through our teaming with this 34-year-old Perth firm).

**William Buck**

Contact Name		ACN	ABN
Conley Manifis		125 178 734	74 125 178 734
Phone	Fax	Address	
08 6436 2888	08 9436 2889	Level 3 15 Labouchere Road SOUTH PERTH WA 6951	
Email		Website	
<a href="mailto:conley.manifis@williambuck.com">conley.manifis@williambuck.com</a>		<a href="http://www.williambuck.com">www.williambuck.com</a>	

## About Us

William Buck is a leading consulting firm with a proud 120 year history. While we are a firm of Chartered Accountants we have a growing reputation for delivering value driven audit and assurance engagements across the private and public sector.

We invest heavily in our people and have a team of public sector audit experts to ensure we provide the best possible services to our WA State and Local Government clients.

While we are part of a National network and we have the ability to draw upon the knowledge and experience of team members throughout Australasia, William Buck Consulting (WA) Pty Ltd, based in South Perth would be responsible for delivering services under CUA AFA2018. The Directors of William Buck Consulting (WA) Pty Ltd have established a governance framework that promotes our strategic objectives and our focus on “changing lives”. This allows our business units to share knowledge, skills and experience, maximising our capacity to respond to our client’s needs.

### ***Financial, Accounting and Taxation Advisory Services***

Our Audit and Assurance team provides procurement advisory services through our internal audit function to a range of State and Local Government entities.

## Skills, Experience and Services

### ***Financial and Accounting Advisory Services***

Through our national technical division, William Buck assists organisations with advice on the proper implementation of the Australian Accounting Standards issued by the Australian Account Standards Board (AASB), the Australian equivalents to the International Financial Reporting Standards (IFRS), Treasurer’s Instructions and other regulations.

We have a proven track record for assisting organisations to understand the ‘real-life’ implications of abstract standards and interpretations, and their practical applications.

We also act as independent technical advisors to our clients. Often organisations need independent technical advice or second opinions to support complex restructuring, significant transactions and financial reporting compliance. Our service is designed to provide technical opinion and to assist organisations with improvements in financial reporting. We ensure that any issues and changes identified are dealt with promptly and effectively.

### **Taxation Advisory Services**

William Buck has some of the leading tax practitioners in Western Australia who specialise in delivering practical, cost effective tax solutions - without the jargon. We understand that clients want to get to the solution quickly and our Tax Services professionals offer clear, concise advice to manage tax risk, local and international tax issues, and develop strategies to utilise tax concessions and planning opportunities.

Our specialists are commercially minded and provide business advice on tax issues ranging from Payroll and Fringe Benefit Tax (“FBT”) to Business Activity Statement (“BAS”) consolidations and succession planning to executive remuneration. Tax compliance and reporting regulations are onerous, time consuming and complex.

We continuously review the needs of our clients to proactively ensure that they have the proper controls and procedures in place to not only meet compliance requirements, but achieve their personal and business objectives.

We can provide taxation advice in a number of areas:

- Preparation of management and statutory accounts
- Preparation and lodgement of FBT, BAS and Payroll taxation returns
- Tax planning
- Specialist tax advice
- Business activity statements
- Other statutory reporting requirements e.g. FBT, BAS, payroll tax and superannuation obligations

### **Industry Certifications and/or Qualifications Relevant to the Category**

- Our Director Audit and Assurance is a Registered Company Auditor, has a Bachelor of Commerce and is a Chartered Accountant (*Institute of Chartered Accountants Australia and New Zealand*) and Fellow Governance Institute of Australia.
- Our two Internal Audit Managers are both Chartered Accountants (*Institute of Chartered Accountants Australia and New Zealand*) and are members of the Institute of Internal Auditors.
- Our External Audit Manager and Supervisors are Chartered Accountants (*Institute of Chartered Accountants Australia and New Zealand*).

### **Industry Partners or Affiliations**

- Institute of Chartered Accountants Australia and New Zealand (ICAAANZ).
- Certified Practising Accountants (CPA) Australia.
- Association of Chartered Certified Accountants
- Institute of Internal Auditors.
- Governance Institute of Australia

## Zed Management Consulting Australia



Contact Name	ACN	ABN
Pam Zervas	613 859 699	20 613 859 699
Phone	Address	
0438 143 729	43a Fullarton Road KENT TOWN SA 5067	
Email	Website	
<a href="mailto:pam.zervas@zedmc.com.au">mailto:pam.zervas@zedmc.com.au</a>	<a href="http://www.zedmc.com.au">www.zedmc.com.au</a>	

### About Us

ZED has extensive experience in providing financial advisory services for the benefit of its clients ranging from design and development of financial models to support forecasting and analytics to reviewing and testing financial rigour providing advice on findings and recommendations.

ZED regularly undertakes financial advisory activities as part of broader projects to provide substantiation of financial and operational future state. For example, ZED has developed numerous financial models to accompany business cases to address a clients' future financial and operational viability to justify the basis for requests for grant and other funding.

Other examples include assisting a private hospital to develop an activity based costing model to allow them to assess current services and inform decision making for expanding future potential services.

ZED has designed and developed financial models and undertaken reviews of financial models for clients including: NT Health, SA Health, Catherine House, North Eastern Community Hospital, Barkuma, Can:Do 4Kids.

### Skills, Experience and Services

Financial modelling, reviews, advice, design, forecasting and analytics.

### Industry Certifications and/or Qualifications Relevant to the Category

- Certified Practising Accountant Program, CPA Australia
- Graduate Diploma of Chartered Accounting, Institute of Chartered Accountants Australia and New Zealand
- Certificate IV in Project Management

### Industry Partners or Affiliations

Institute of Chartered Accountants Australian and New Zealand registered training provider