Key contacts

David Montani
Tax Director
t 08 9463 2463
e david.montani@nexiaperth.com.au

David has 25 years' experience in taxation and business advisory. He and his team are devoted exclusively to specialist tax consulting, and has advised on an extensive range of taxation matters.

David's areas of expertise include business and corporate restructures, business sales, Capital Gains Tax, small business relief concessions, trust losses, private company loans, property transactions and GST.

He also regularly delivers specialist tax training to other practitioners under the Nexia Tax Alliance.

Wayne Rogers
Director
t 08 9463 2463
e wayne.rogers@nexiaperth.com.au

Wayne has over 29 years' experience in tax consulting and business services, including time with one of the Big 4 accounting firms. He looks after a number of significant clients, including private companies and groups in a number of industries.

Wayne's expertise on significant government reform has seen a number of his articles published in the respected Taxation Institute of Australia and Chamber of Commerce and Industry journals.

Wayne also has extensive tax consulting experience in international tax restructuring and establishing business structures, and has highly detailed knowledge of corporate tax issues.

Dean Birch
Senior Consultant
t 08 9463 2463
e dean.birch@nexiaperth.com.au

Dean's specialty is in taxation consulting and has advised a broad range of clients on an array of tax matters over the last 12 years. In particular, Dean has an interest in employment tax issues, including salary packaging, expatriate tax issues and fringe benefits tax.

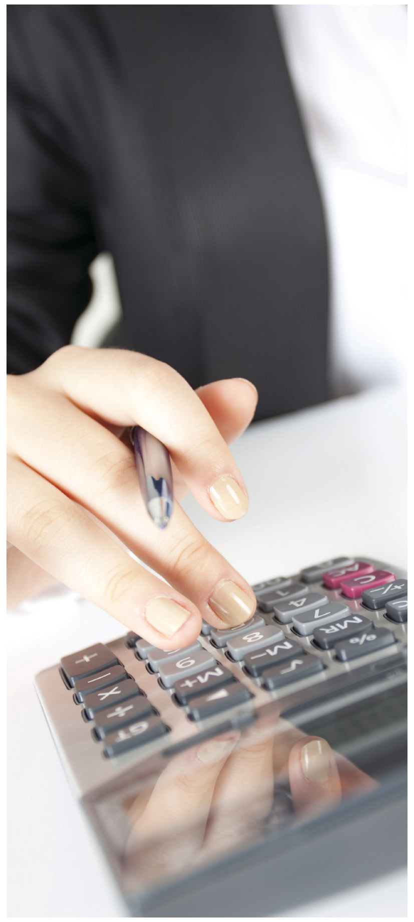
Dean has over 15 years' management experience working for a global organisation in the United Kingdom

Simeran Cheema
Consultant
t 08 9463 2463
e simeran.cheema@nexiaperth.com.au

Simeran works on all aspects of taxation and business advisory. Her specialty is in taxation consulting and she has advised many clients on a range of taxation matters over the last 12 years. In particular, Simeran has provided advice in the areas of expatriate tax issues, employee share schemes and superannuation.

Prior to joining Nexia Perth, Simeran worked at PwC and law firm, Norton Smailes.

Simeran has completed her Master of Taxation through the University of New South Wales.



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Nexia
Australia

You.
Your Client.
Nexia.
Everybody Wins.

Nexia **Tax Alliance**

Part of NEXTension Network

Welcome to the Nexia Tax Alliance

The Nexia Tax Alliance helps practitioners provide more services to clients.

Nexia provides tax advice to firms on behalf of their clients from which practitioners and their clients have significantly benefitted. The training sessions and phone call service are also very convenient.

Following is more detail on how the Nexia Tax Alliance can benefit your practice.

What is the Nexia Tax Alliance?

The Nexia Tax Consulting division comprises a team of experienced advisors. We specialise in delivering solutions-based outcomes to assist clients in making important decisions concerning their businesses. Membership to the Nexia Tax Alliance gives you access to our vast accumulation of experience in advising on a wide range of taxation issues.

Tax Law is increasingly complex and voluminous. Clients typically ask their accountant for tax advice, or perhaps more commonly, accountants identify tax issues.

Clients rely on you to resolve tax issues that might be outside of your comfort zone. This may come with time-cost pressures as well as the stress of trying to resolve an issue that you may be uncomfortable with. The Nexia Tax Alliance can help by giving your client access to the specialist tax advice they need.

Our personalised and targeted Tax Alliance program includes:

- Attend eight tax training sessions per year on relevant tax and business topics
- Attend one tax training session for free before joining. You can assess the quality first with no obligations
- Convenient phone call service
- Meet with us for free
- Access to written tax advice

Key Benefits

Tax Training

Nexia conducts eight tax training sessions per year which provide informative and practical coverage of a range of current and relevant tax and business topics.

Nexia Tax Alliance members are entitled to have up to three people from their firm attend each training session, which will count as CPD hours.

FREE Training Session

Prior to joining the Nexia Tax Alliance program, we invite you to attend one session at no cost or obligation in order to meet the Nexia Tax Consulting team before deciding to join the Nexia Tax Alliance

Phone call service

Sometimes you come across a tax issue for a client where it would be helpful to ask a tax specialist about it.

Nexia's phone call service allows you to call any of our tax consulting team with a tax query. We will endeavour to resolve your query or perhaps point you in the right direction. Whilst this is not intended to be a complete substitute for your own research, we place no limitation on the number of calls you can make. If we can save you just a small amount of time or frustration over a year, this alone pays for the annual membership fee.

Responses are only verbal and cannot be relied on as advice. If the issue requires any research or a written response is desired, we can provide a fee proposal.

Complimentary meeting

It is understandable that a client may be reluctant to commit to an engagement if they are not used to paying for specialist advice. Accordingly, we are more than happy to have a brief meeting with you and your client – free of charge. This allows your client to fully explain their circumstances and we can discuss the relevant tax issues.

Even if your client decides not to proceed any further, all it has cost is a small amount of their time. But this still enhances your relationship because recommending they see a tax specialist demonstrates that you are looking after your clients' best interests.

Written advice

Tax is a risk issue for businesses, and just like any other business risk, it must be managed. Your clients pay insurance to manage the risk of their building being destroyed. In the same way, paying for tax advice is not just about getting the best tax result, it is also managing the risk of unnecessarily triggering a tax exposure. In addition, there are occasions where your client can only make an informed decision when the tax consequences are known.

Where your client is confronted with this kind of significant tax issue, written advice may be warranted. This can be tailored to the needs and risk profile of your client. The following issues are typically ones where a client should seek written advice:

- Qualifying for and applying the CGT small business relief concessions to a business or asset sale, including extracting the funds from a trust or company
- Sell the business assets or sell the company?
- Property transactions, including income tax, CGT, GST and main residence exemption
- More complicated trust losses or Division 7A scenarios
- Restructures, mergers and introducing or exiting owners of a business
- International tax issues
- Winding up entities.

Our advice is written in plain English. Your client will understand their position and be clear on anything required to be done or any recommendations.

Our approach

Fee proposals

Where written advice is required, we provide a fee proposal and scope for approval before any work commences. This ensures there are no surprises over the scope and cost of the advice.

We guarantee not to solicit your client

How we deliver tax advice to your client is entirely up to you. Some practitioners prefer that we have no contact with their client, while others are happy for us to liaise directly with their client. We work in whatever way suits you. The overriding principle is that you are our client and we guarantee not to solicit your client. The foundation of the Nexia Tax Alliance is the trust that practitioners have in us to deliver the best outcome for all.

Annual membership

The annual membership to join the Tax Alliance is $580 GST exclusive ($638 GST inclusive) and runs from 1 July to 30 June.

With the eight training sessions and phone call service, this program is exceptional value.

If you would like to join the Nexia Tax Alliance, please complete the enclosed membership form or contact one of our team to discuss further.

Registration Form

Please complete the following form to join the Nexia Tax Alliance and email it to cassie.castle@nexiaperth.com.au

Company ____________________

Partner / Director / Principal ____________________

Address ____________________

Contact Person ____________________

Email Address ____________________

Phone Number ____________________

Fax Number ____________________

Total (incl GST) $ 638.00

Payment Methods

Cheque
Please make cheques payable to:
Nexia Perth
GPO Box 2570
Perth WA 6001

Tax Invoice

This form will become a tax invoice upon payment

Credit Card

Visa ☐ Mastercard ☐ Expiry Date ☐☐ ☐☐ Amount $ ____________

Card Number ☐☐☐☐ ☐☐☐☐ ☐☐☐☐ ☐☐☐☐

Card Holder ____________________ Signature ____________________

EFT Payment Details

Bank	Macquarie Bank
BSB:	186 300
A/C No.:	2481 08235
A/C Name:	Nexia Perth Pty Ltd
Reference:	TAXAL00 (Company Name)