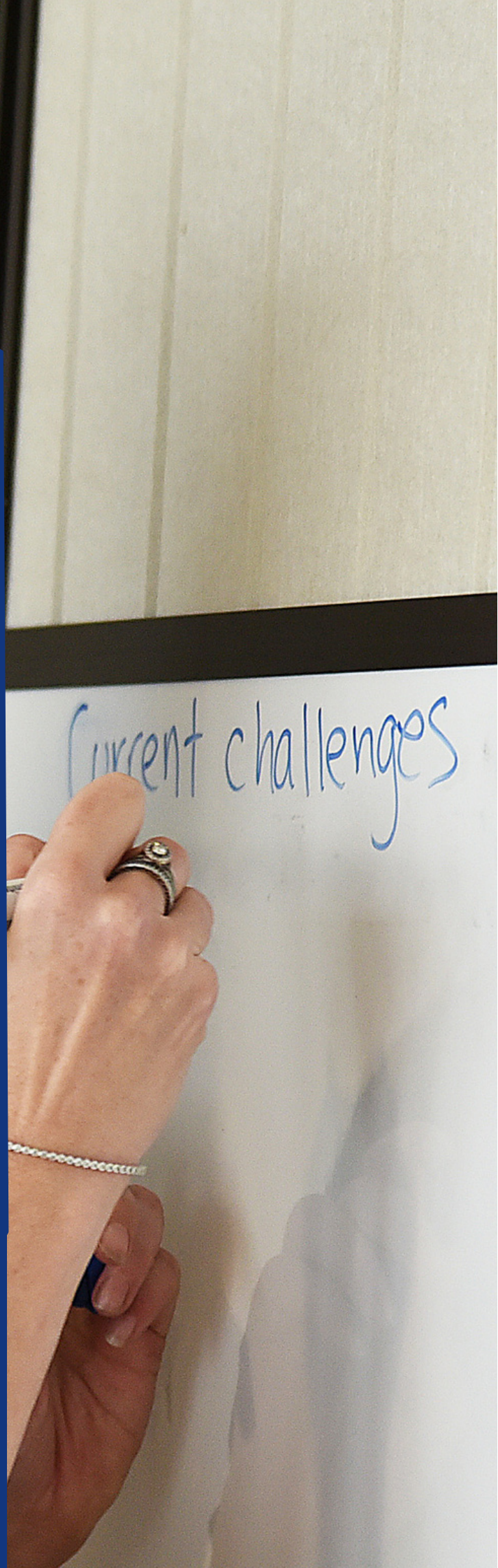




Professional Financial Services Roundtable

2021



The Face of Collaboration in 2021

Collaboration takes many shapes and generally presents opportunities to support innovation by combining capabilities and expertise around a common purpose.

A Forbes Magazine's article Increasing Complexity is Driving The Value of Collaboration suggested "the ability to collaborate is becoming a key driver of value creation." At some stage all businesses have a need to reach out for professional advice or face a new challenge that requires experience beyond existing professional relationships.

The CBD Sydney Chamber convened a number of Roundtable groups comprising Member Businesses, each designed to encourage Members to collaborate to expand knowledge and networks, while actively seeking opportunities to make available high levels of expertise and professional service.

This expertise within this group is also available to any business that might require assistance - with the added confidence that each business is a Member of the CBD Sydney Chamber of Commerce and will act to a high level of professional service standards.

- Altus Financial
- Glass Financial Services
- Groves & Partners
- JCL Legal
- Providence Property Group
- Vincents Restructuring & Insolvency

Altus Financial

Altus Financial



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Marc Walsh
Principal Client Advisor
Taxation & SME Advisory

Altus Financial

Marc Walsh is Principal Client Advisor who is driven by bringing your business vision and concept to life and implementing strategies and tax structures to make that happen. His strengths lie in Tax, FBT, remuneration, Capital Gains Tax, and establishing structures that enable our clients to run their day to day operations but also to help with their strategic and long term growth.

He is also a specialist tax practitioner that can relay complex taxation matters in a simplistic way.

What Do We Specialise In?

Altus Financial provides integrated financial guidance for closely-held/private clients with a specific focus on SMEs. Altus is financial guidance without jargon, doublespeak or fine print. Whether you're looking to protect your personal wealth or grow your business, you'll get expert award-winning advice delivered in your language.

Key Areas Of Expertise

- SME and family group advisory
- Business performance and outsourced CFO
- Income tax, indirect tax and GST advisory
- Structuring and Restructuring
- International taxation
- Corporate advisory and succession planning.

How We Can Help

- Advice without context is to turn off your life GPS. We address your entire financial world and guide you toward your goals
- Clear processes and open communication, we tell it like it is
- Resting on our laurels isn't in our DNA because great work doesn't happen by accident
- We are an award winning multi-disciplinary team with over 30 year of class-leading business and financial advice
- Why follow in the footsteps of other firms when a better path so clearly exists?

JCL Legal



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Jeffrey Choy Principal

JCL Legal

Jeffrey Choy is the Principal of JCL Legal.

Prior to entering law was fully engaged in small business. He has owned a variety of different businesses including a photographic minilab; a commercial photo laboratory; wedding photography business; hairdressing salon and a small transport business.

In addition he has both owned and leased commercial premises. He understands business.

What Do We Specialise In?

The firm has represented clients in all manner of situations both large and small. Whilst our primary emphasis is on litigation where we have conducted matters from the highest court in the land, The High Court of Australia to local court, tribunals and mediations. The extensive experience of our team includes the buying and selling of real estate, the buying and selling of businesses along with over 20 years experience in handling migration matters for individuals and businesses. We pride ourselves that the majority of our clients come to us as a result of recommendation.

How We Can Help

- JCL believes that one of the things that really sets it aside is that they take the time to listen. They want to know your story and how you wish to resolve your concern and how resolution fits into your full life circumstance. They then with our knowledge of the law to obtain the best possible result.
- Why follow in the footsteps of other firms when a better path so clearly exists?

Key Areas Of Expertise

- Civil litigation
- Family & De Facto
- Statutory Demand
- Residential and commercial conveyancing and leasing
- Family asset preservation
- Notary Public

Groves & Partners

Groves & Partners



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Aaron Robinson Director & Chartered Accountant

Aaron has experience in all areas of transaction advisory and valuation services, however specialises in acquisition advice, due diligence advice and business valuations.

Prior to joining Groves & Partners, Aaron's career included roles in financial services, taxation and transaction advisory in both Sydney and London.

Aaron holds a Bachelor of Commerce and is a Chartered Accountant. Aaron has experience in a range of industries, including but not limited to aged care, commercial services, logistics and professional services.

Aaron frequently provides specialist, technical transaction advice in areas such as due diligence and acquisition strategy. Aaron is also trusted for his business, company and share valuation advice, which is often sought for litigation matters and disputes, as well as to assist with restructures and for strategic planning.

What Do We Specialise In?

- Business Sales: whether you are looking to sell your fast growing technology business to an offshore buyer, have received an offer from your main competitor to buy out your long established freight and logistics business and are unsure what to do next or are considering options to sell off a division of your multi-faceted managed services business, chances are we have acted on a similar matter.
- Business Acquisitions: our team has a strong track record of acting for established companies and investors alike to help them acquire businesses which deliver tangible commercial and strategic benefit.
- Due Diligence: our highly intelligent and analytical team of advisors are relied upon for due diligence advice that ensures clients avoid bad business deals and complete business sales and purchases for long term benefit.
- Expert Valuations: as expert valuers of businesses, companies, shares, intangible assets and intellectual property we're trusted and called upon for our expertise in litigation matters, disputes, to assist with taxation requirements and for strategic planning needs.
- Business Transformation and Improvement: we are trusted by clients to provide practical and effective business transformation and improvement advice which improves company values and marketability.

How We Can Help

- Our clients trust us to negotiate business sales and acquisitions that provide outstanding commercial outcomes, assist them with complex financial analysis, business valuation and due diligence matters, and provide reliable, forward-thinking strategic advice.
- We approach each matter in a practical, energetic and no-nonsense manner, and pride ourselves on creating innovative and efficient solutions to difficult problems.

Key Areas Of Expertise

- Business sales, mergers and acquisitions: advice and execution
- Business transformation and improvement
- Sourcing business acquisition opportunities
- Due diligence advice
- Business, company and shareholding valuation services
- Expert reports for transaction disputes
- Court attendance as expert witnesses

VINCENTS RESTRUCTURING & INSOLVENCY



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Louisa Sijabat
Director, Restructuring & Insolvency
(Trustee in Bankruptcy) – Personal matters

Vincents Restructuring & Insolvency

Vincents Restructuring & Insolvency provides advice to, and taking formal appointments over, financially and operationally distressed companies and acting as trustee in bankruptcy to insolvent individuals.

Louisa Sijabat is an experienced Trustee in Bankruptcy, Liquidator and Director at Vincents. She works with people and companies who are going through a tight financial situation.

How We Can Help

Vincents works with people and companies who are going through a stressed financial situation. Our approach is practical.

We will listen to the facts of the situation and advise on the options available in that specific situation. If one of the options is bankruptcy, liquidation, administration or similar, we will explain what happens practically during the process in plain English and answer all questions.

Key Areas Of Expertise

- Voluntary Administrations
- Liquidations (solvent and insolvent)
- Receiverships
- Turnaround and restructuring advice
- Safe harbour advice
- Statutory trustee appointments
- Trustee in bankruptcy (for individuals)

Glass Financial Services



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GLASS FINANCIAL SERVICES
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Ben Flood CEO

Glass Financial Services

Glass Financial is an innovative finance brokerage combining traditional lending methods with new lending technology, providing a seamless and transparent experience for both consumers and brokers alike. Our leadership combines decades of experience in banking and financial services with similar level of experience in strategy and business model innovation, enabling Glass Financial to bring genuine disruption to the Australian financial sector.

It is committed to educating and guiding our clients through the lending journey, ensuring they understand every step in the process. And equally committed to training our brokers to the highest standards, equipping them to build successful businesses that achieve superior outcomes for their clients.

How We Can Help

- Core Competencies - Glass Financial has a diverse team of brokers with extensive experience in residential, business, and commercial lending.
- Our strong relationships with major banks, second-tier lenders and select private funders provide our clients with access to a diverse range of lending solutions.
- Delivering a customer centred service - At Glass Financial, our brokers work with clients to understand their broader personal and business vision and goals.
- This consultative approach enables them to identify and structure the right finance solution, empowering their client to achieve their long-term strategic objectives.

Key Areas Of Expertise

- Residential Purchases: Refinance & debt consolidation. Investment
- Property loans & structuring; Specialist Residential (Lo Doc and credit impaired); ATO debts; SMSF Commercial: Commercial property finance (purchase/refinance); Construction development; Private funding (asset lending); Short term funding; SMSF & specialist lending; 2nd mortgage caveat lending
- Asset Finance: Equipment finance (Full & Lo Doc) ; Trade finance/working;
- Capital solutions; Unsecured business lending (short term); Debtor funding;
- Car loans



Providence Property Group



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Jay Pace DIRECTOR

Glass Financial Services

Jay began his career in the investment industry back in 2005 when he became a licensed derivatives broker, trading futures on the Australian Securities Exchange. Jay eventually managed millions of dollars in client funds participating in domestic and international markets.

Over the course of a decade, he became an expert strategist in shares and derivatives, specialising in exchange-traded options.

Jays love for investments led him to discover property options and his passion for analyzing market trends allowed him to create an attractive portfolio for himself. He joined Providence in 2014 and continues to assist his clients in reaching their wealth generation goals through property

What Do We Specialise In?

At Providence, we help first time & experienced property buyers, buy existing or new residential and commercial property, all around Australia. I encourage you to watch our video, "[why buyers choose Providence](#)". For more information on Providence, click [here](#).

How We Can Help

- When a client engages with a Providence specialist property negotiator, they will be employing the services of a licensed and independent professional who specialise in researching, reviewing, evaluating and negotiating the purchase of a property on behalf of (you) the buyer. We help Aussies purchase:
- Existing
- Sub-dividable Blocks
- Newly completed Property & Commercial

Key Areas Of Expertise

- Research is the tip of our spear. our local and international research team provide the insights, that our agents need on the ground to give them the highest probability of success
- Locating your ideal property (on and off-market) looking at the State, City, Suburb, Street & Structure etc.
- Assessing the properties pros and cons (Build quality, Owner-occupier appeal, layout and use of space, supply & demand, distance to amenities etc.)
- Negotiating for the best price on the most attractive terms

Membership Counts. Be A Member.

The CBD Sydney Chamber connects, engages and supports businesses and people in business to achieve the best possible outcome – whatever the business conditions.

Members have the opportunity to:

- Increase their business's visibility through listing on the CBD Sydney Member Directory
- Connect through networking and other events
- Have access to business legal and HR services that support their business when it's needed
- Access to accredited training and skills education at no cost through BSI Learning
- Access to the Members-only digital marketplace
- Bi-monthly complimentary printed BiziNet Magazine through BiziNet Media

That's why Membership Counts.

cbdsydneychamber.com.au/why-join

CBD Sydney Chamber Sponsor Members



Media Partner



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