

What is SUCCESS?



CBG PARTNERS
SUCCESS. TOGETHER

Every business is unique, which is why one-size-fits-all solutions don't work.

At CBG Partners, we work with you to achieve your vision of business success.

Our team of specialised and qualified accountants are focused on helping you solve your biggest problems, realise your business potential, and we will always strive to achieve exceptional results for you.

Often SME's feel like they're not "big enough business" to justify an Independent Business Partner. The truth is, every business owner, from sole operators to large corporations, deserves to have honest and individual business advice, strategies and solutions.

Our **CBG Partners' Independent Business Partners** provide valuable insights into your business, creating tailored strategies and results driven solutions that align with what you truly want your business to achieve.



CBG Partners – Independent Business Partners...

...take the time to understand the key drivers to your business success.

...are your accountability partner, working side by side with you to implement successful strategies.

...offer knowledge and real-world experience, creating faster and more efficient services while keeping your costs down and results high quality.



CBG Partners –

A powerful business ally, providing clear and strategic advice to help your business grow and perform.

At CBG Partners, we don't put band-aids on your business. If there's a business or financial problem, we'll research and investigate further, often finding a deeper source. Our Independent Business Partners have the experience and knowledge to work with you, side by side, to develop appropriate strategies and solutions for your unique situation and solve these deeper problems. This core understanding of your business creates a strong foundation, so you can drive your business to an extraordinary new level.

OUR 5 STEPS TO BUSINESS SUCCESS program is a powerful tool that we use to better understand the key drivers to your business's success.



Know your why – to get clear on what's important



Know your numbers – to understand the drivers behind your financial position



Know where you are now – so you can map out where you want to be



Set the plan – making it measurable and accountable



Make it happen – through implementation and ongoing management



CBG Partners – *working with you to plan and achieve your vision of success.*

YOUR BUSINESS SOLUTIONS

Our Independent Business Partners are skilled in helping you plan and implement business practices to ensure that you maximise business performance. We do this by understanding what is happening in your business now, what has happened historically, and what the future of your business could look like.

No matter where you are in the lifecycle of your business, we work with you to maximise and leverage your finances, so you can achieve success that's right for your business. Our specialist knowledge and experience allow us to gauge where your business fits financially within your industry. From this, we're able to develop clearer and more effective strategies to achieve your financial targets.

From GST and BAS related matters to financial statements and tax return preparation – no client is “too big” or “too small”. Through cloud-based technologies, you can receive assistance from us in real time, to implement targeted strategies immediately and achieve your goals sooner. We'll give you practical advice and demonstrate how you can have the freedom to access your office where and when you want it to be: on the road, at home or overseas.

- **Better Business Program**
- **Business and financial forecasting**
- **Business value and change management**
- **Cloud accounting technologies**
- **Small business accounting**
- **Business taxation services**

YOUR PERSONAL SOLUTIONS

It's important to recognise where you currently are financially, so that we can help you find and understand the right path for your future.

To do that, you need an accountant that does more for you than simply processing and lodging your annual tax return. Which is why we offer a FREE financial health check-up. It's an in-depth look at your personal situation, with clear advice to help improve your current financial wellbeing. Our vital check-up includes home loan, income protection and life insurance recommendations.

- **Tax planning**
- **Financial health assessments**
- **Net wealth management plans**

SOLUTIONS FOR YOUR FUTURE

Once we've understood your current financial situation, we'll guide you through that next critical step - planning for your financial future.

We are your superannuation specialists, providing comprehensive superannuation and retirement planning services. When we prepare your superannuation funds' year end requirements, we'll also look after your related entities' taxation and business needs so that all matters can be dealt with using a universal approach. We can also prepare trust account audits and required statutory documentation so that you are covered at every stage of your life.

- **Self managed super funds**
- **Estate planning**
- **Business succession planning**

Our **CBG** Partners values

Empathy and Empowerment.

You deserve to have your needs understood, no matter how complex or how simple your financial arrangements may be. We'll empower you to understand and follow the pathways that provide the best outcomes for your business needs.

Integrity. Always.

Your business success is our priority. We will not promise the world and deliver an atlas. At CBG Partners, we do what we say and deliver results, every time.

Excellence in Solutions.

Your results are driven by our knowledge and experience, reinforced with a partnership built on accountability and action.

Kevin Colleton – Managing Partner

Kevin obtained his Bachelor of Commerce in 1994 and is a Registered Tax Agent, specialising in Strategic Management, Business Planning and Superannuation. He is a fellow of CPA Australia and became a Partner in CBG Partners in 2003.



I take the 'roll up your sleeves' approach with my clients to dive deep into how their business operates. It is all about knowing the right questions to ask to help solve real problems. Often what seems like the cause of the problem, is actually a result of another issue, which is why I keep researching until I find the real issue. When that happens, there's a real excitement, because it means we can create the right solution specific to that client.



Joshua Jackson – Partner

Josh has a Bachelor of Accounting and was admitted as a member of Chartered Accountants Australia & New Zealand in 2013. He is also a registered Tax Agent and Justice of the Peace.



I am the small and medium enterprise specialist in our CBG team, and I take great pride in fostering client relationships to help clients grow financially and to achieve their business goals. Everyone talks about scaling up, but what if we take the tools that create success for big business and down-scale them so that they also work for small business? You could say my speciality is in reverse engineering for success.

Our CBG Partners Professional and Administration Team



Our team offer experienced accounting and tax advice, support and services. We're dedicated to providing you with outstanding service while helping you build and maintain personal and business financial growth.





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