

10 ways we can help you.....

Patison Partners

You are probably aware of our reputation for providing outstanding professional accounting services to a wide variety of clients over a number of years – but are you aware of the other services Patison Partners can provide you? Tax returns and financial statement preparation are just a small part of the services that our firm has to offer.

ONE Business Valuations

Thinking of buying or selling a business? Would you like to know how much your business is worth? Using a number of valuation techniques and drawing on financial data and qualitative information, as well as our industry expertise, we can provide this service to you.

TWO Business Management Consulting

If you have a desire to drive your business further, why not draw on the many years experience our accountants have to assist you. Numbers are our specialty and interpreting the financial statements of your business can be the key to driving your business further.

THREE Bendigo Bank Term Deposits

Our office has a Bendigo Bank Agency where you can make investments in Term Deposits. Our friendly staff can assist you in managing your term deposit interest rate terms through our agency. We will contact you when your renewal is approaching and take care of any documentation required.

Call us today - Our rates are often better than our competitors.

FOUR Share Trading

We can help you manage your investments by providing a fast and reliable share trading service. We can assist with buying or selling shares and have access to our own research broker.

Each year we conduct a market update seminar which our share investment clients have found to be an excellent opportunity to meet and speak with an expert in the Australian share market.

FIVE Self Managed Superannuation

Have you ever considered managing your own superannuation? We have helped many clients take the step into managing their own superannuation fund and incorporating superannuation to their tax management and investment strategies. Our experienced superannuation specialists can assist you to understand the benefits of self managed superannuation funds as well as your role and responsibilities as the trustee of your own fund.

SIX Investment Portfolio Management Services

Do you find keeping track of your investments a stressful task? We can take all the hassle and bother of keeping track of your investments with our Investment Portfolio Management Service. We will take care of recording income, acquisitions and sales, demergers, consolidations and splits, all of which, have made tracking your shares more complicated. You will receive regular reports, which enables you to make informed decisions about your investments. An added bonus of this service is that it may also reduce your accounting fees as all the information is properly prepared and is readily available to your accountant.

SEVEN Financial Planning



Whether you are approaching retirement, starting out in business or looking to establish investments to provide for your family's future - you will find an appointment with our financial planners well worth your while. We have a direct relationship with OzPlan Financial Services Pty Ltd licence No: 221235, who can provide you with a no-obligation free initial appointment to assist your financial planning.

EIGHT Tax Audit Insurance

Every client dreads the day that the tax man comes knocking to audit them. Even if you have done nothing wrong, a tax audit takes a lot of time, which can become costly and cause great inconvenience to you and your business.

Our tax audit insurance takes away some of the pain involved in a tax audit by ensuring that you can fully utilise and work with your accountant in this process without worrying about a big accounting bill.

NINE Cashflow Manager

Cashflow Manager is a user friendly software package suited to small businesses wishing to computerise their accounting function. This package was developed by an accountant and is distributed via accountants only. We highly recommend this software package and can assist you with all your installation and training requirements.

TEN IT Figures



As accountants we recognize the vital role of bookkeepers in the recording of our clients' data. Our bookkeeping arm known as IT Figures, is designed to provide you with a complete business solution. This service enables timely and accurate financial reports, which give quality information to your accountant at end of year.

Our bookkeepers and system consultants are experienced in a wide variety of industries and software packages and have extensive training in accounting. IT Figures can also provide training for individuals who wish to perform the bookkeeping for their own business.

IT Figures can assist you in:

- **Bookkeeping**
- **BAS & GST Reporting**
- **Group or Individual Training**
- **Installation, Design & Setup**
- **Payroll and Payment Summaries**
- **Software Sales**
- **System Consulting**
- **Technical Support**

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