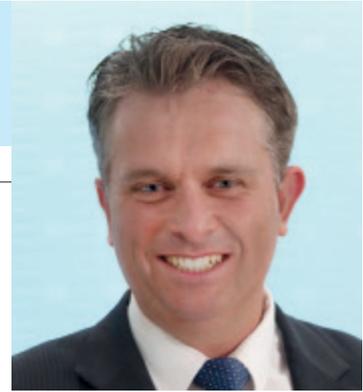


Professional Audit Expertise



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Key Values

- Committed to acting in a diligent and ethical manner to uphold the highest professional standards of independent SMSF auditing.
- On the leading edge of inquiry - to identify and address the ever-evolving needs of the SMSF audit industry.
- Dedicated to the continuous improvement of my person, staff and practice.

Summary

As a Fellow and long-standing member of the SMSF Association (SA), the peak body for SMSF professionals, I was one of the early achievers of the SMSF Specialist Advisor™ accreditation. With over two decades of experience as an SMSF auditor, advisor and administrator, I am committed to delivering best practice in the provision of SMSF audit services. Prior to establishing my own specialist SMSF audit business, I held roles with leading accounting firms Bongiorno & Partners (NSW), Bentleys MRI (Sydney) and HLB Mann Judd (Sydney). I have earned a reputation in the marketplace as a trusted, independent SMSF auditor. As a Chartered Accountant, I lead a specialist SMSF audit team – independently servicing accounting and administration practices right across Australia, giving me unique insights into industry matters and shifts in client sentiments and needs. I am a regular commentator on SMSF issues in industry publications and the Australian Financial Review.

Career

Saul SMSF | 2014 - Present

Founder and Managing Director

After a long and passionate career of specialisation in self-managed superannuation, I founded Saul SMSF in 2014 to fully address the need to provide quality, efficient and independent SMSF audits. Saul SMSF is committed to filling this space and producing audits of the highest possible standard. We recognise that there should be no trade-off between cost and quality. I ensure that all our audits are performed by my team of experienced specialist auditors. No work is ever outsourced or sent overseas. I keep abreast of all industry developments and monitor any changes in consumer sentiments so that I can anticipate client needs and tailor my service to suit. To this end, I designed and executed the implementation of our specialised cloud-based SMSF Audit Platform, "RELIANCE". Being a long-standing member, I hold the values and standard of professionalism embodied by the SMSF Association very close to my heart – they are the standards I strive for while performing each audit. I have instilled these values within my staff, and today, we are recognised as one of Australia's most experienced and trusted SMSF Auditors.

NSW Catchers Trust | June 2009 – Present

Executive Secretary

Having spent my early years in the NSW Fishing Industry, I always maintained a fond interest of Australian commercial fishing matters. In 2009, I was invited to act as Executive Secretary for the Catchers Trust, a 50% shareholder of the Sydney Fish Market, the largest seafood market in the southern hemisphere. The Catchers Trust reports to over 600 industry members. In recent years, I have had extensive involvement in the redevelopment of the Sydney Fish Market as part of the Bays Precinct, in conjunction with Urban Growth (NSW). The redeveloped Sydney Fish Market will enhance its role as a major tourist destination and showcase sustainable Australian seafood, with planned annual visitations of up to 6 million people per year.

Saul CA | January 2003 - Present

Founder and Managing Director

In 2006, I established my own practice, Saul Chartered Accountants, to provide clients with comprehensive Business Advisory and SMSF audit services of the highest calibre. Having worked thus far in management roles in big accounting corporations, I thoroughly understood the benefits of quality systems and processes, but recognised that clients often felt let down when it came to personal service and understanding of their individual needs. With this in mind, I saw the opportunity to design a quality practice from the ground up, founded on 5 pillars of:

- Independence
- Trust
- Value
- Professionalism
- Efficiency

To date, I have worked with clients across a broad range of industries, servicing their needs and furthering their aspirations. In June 2014, due to the exponential growth and specialisation in SMSF audit services, this component was segregated to establish "Saul SMSF".

Bentleys MRI Sydney | August 2002 – July 2005

Manager, Superannuation and Financial Planning

Key roles:

- Design, establish, grow and manage a new specialist SMSF Division.
- Oversee staff training and ensure the division maintains specialist knowledge by keeping up to date with legislative changes and awareness of strategic opportunities.
- Source and manage clients to raise division profile.
- Uphold and reinforce an idea of continuous improvement.

HLB Mann Judd (NSW) | January 2000 – December 2002

Supervisor, Business Services, SMSF Administration and Auditing

- Coordinate, train and assist staff through prioritizing and delegating workflow.
- Monitor budgets and performance.
- Liaise with clients.
- Research legislative changes.

Bongiorno and Partners | January 1995 – December 1999
Senior Accountant, Business Services and SMSF Administration

Professional Qualifications

SMSF Registered Auditor – ASIC | May 2013
SMSF Specialist Advisor – SPAA | June 2005
Cert. of Public Practice – CAANZ | June 2005
Australian Registered Tax Agent – ATO | December 2005
Advanced Diploma of Financial Services (FNS60104, PS146) – TSG | June 2004
Cert. of Superannuation Management – ASFA | June 2003
Chartered Accountant – CAANZ | December 2000

Professional Memberships

Specialist Member of the SMSF Association (SA)
Member of Chartered Accountants Australia and New Zealand (CAANZ)
Member of the National Tax & Accounting Association of Australia (NTAA)

Education

Bachelor of Financial Administration | 1993
University of New England, Australia
Majoring in Auditing, Financial Accounting, Taxation and Corporation Law

Special Achievements

Queens Scout Award | 1988
Government House, Sydney

Delivery of an Independent Review of Structural Adjustment Recommendations for the NSW Commercial Fishing Industry | September 2015
Completed at the request of the NSW Seafood Industry Council. The completed report was provided to SARC and the Hon. Niall Blair - NSW Minister for Primary Industries

Publications

Published and/or quoted in the following publications (attached):

- SMSF Adviser
- Australian Financial Review

References

Available upon request.