

We've helped our clients reach their business goals for over 90 years.

At Ulton, we're with you. We put you at the heart of what we do, and craft finance and business strategies that help you realise your financial and business goals.

Most SME owners are extremely driven and work tirelessly to build their business. They need solutions to help them improve their business performance but lack the specialist business and financial management skills to do so.

How we can help elevate your business

Our team of Business Services advisors provide a comprehensive range of services including;

- Reviewing your overall net wealth position and providing a snapshot of your current financial position.
- Identifying risk concerns in order to protect assets and income.
- Structuring of your business operations and investments.
- Providing advice in relation to tax planning, business structures, and business systems.
- Preparing budgets and cashflow.
- Developing tax minimisation and wealth creation strategies.
- Analysing performance results and applying strategies for improvement.
- Educate, support and give advice to clients on relevant accounting resources (i.e. Castaway, MYOB, Reckon, Xero, BankLink, Quickbooks).
- Preparing financial statements and income tax returns such as BAS, FBT and other tax related matters.
- Providing advice to clients undergoing audit by the ATO, Workcover and other relevant bodies.

How we can benefit your business

Many business owners are heavily involved in the day-to-day operations and get bogged down working 'in' their business, rather than 'on' their business. There are so many ways we can help you, here's just a few:

- We provide easy to understand reports and spreadsheets, showing critical financial information.
- We ensure your tax obligations are continuously met and offer tax minimisation strategies.
- You receive on-demand access to your own dedicated Business Services advisor.
- We can offer valuable advice on how to protect your business, personal and family assets from risks.
- We can help you find ways to improve your work/life balance – it's all about creating the life you want.

Why our clients choose us

Many of our clients say "Why am I working so hard?" and "What's it all for?" For many of them (and perhaps you), it's about financial security and having a certain lifestyle – one they can enjoy without having to continually 'work' to achieve it.

We help clients reach their goals by:

1. Understanding that our clients have worked hard to get where they are. We help them protect what they've built by assisting them in making more informed decisions that shape the future – for themselves, their family, and future generations.
2. Helping to educate our clients – not just put numbers in front of them. We put our energy into helping our clients understand their numbers. We've even drawn some creative illustrations to help explain our strategies – and our clients love them.
3. Showing the direct link between having a business that performs well and the payoffs that come with it – like income and lifestyle.

Client Case Study

'The Restructure'

Client issues

We were engaged to help our client complete their annual tax obligations. After reviewing their current business structure, we discovered that they were being incorrectly taxed at the highest marginal tax rate. The business structure was also set up in such a way that the client's personal assets were potentially at risk in the event of litigation.

Ulton's results

Our Business Services team suggested the client restructure their business operations to better protect their assets, provide greater flexibility in the future, and achieve better tax outcomes.

As a result of our strategy, our client now enjoys greater peace of mind and security. Funds that would otherwise have been earmarked for tax are now being reinvested back in the business – creating working capital and a greater ability to create wealth.

Service extension

The business has experienced continued growth and has further engaged our Business Services team to provide business performance monitoring services. These services provide invaluable insights to help our client make strategic and operational decisions and manage their risks.

"Our role is to help you protect your assets and create wealth. We genuinely care about what matters to you and want to help you create the best opportunities for your life"

Jamie Rach
Ulton Business Services Partner

Brisbane
Bundaberg
Fraser Coast
Gladstone

Business Advisors
Chartered Accountants
Wealth Managers

(07) 4154 0400
info@ulton.net
ulton.net



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