

Thrive with the right financial management advice.

At Ulton, we understand that running a business is both challenging and rewarding.

For many small to medium-sized businesses, financial information can be hard to obtain, difficult to understand, and sometimes not available when you need it. Yet good quality data is essential for making critical business decisions.

When you partner with our Financial Management team, we remove obstacles, add value, and provide a sounding board for essential business decisions.

How we can help

Our multidisciplinary Financial Management team is supported by decades of insights and experience. We offer a wide range of services including:

- **On-demand, independent financial advice** – we act as a sounding board to help you make smart financial decisions.
- **Timely and accurate reporting** – tracking your performance better will enable you to make better decisions for your future. We develop detailed yearly budgets and forecasts.
- **Financial statements** – we can process and reconcile month-end financial statements and monthly management accounts, including budget vs actual reporting.
- **Easy to understand dashboards** – so you can increase your knowledge and identify trends in your business.
- **Business systems reviews** – we are here to guide you through changing operational environments and help you review, plan, and develop strong business strategies, systems, and processes.
- **Tax and compliance services** – we help you meet your tax obligations on time.
- **Board or management meeting resources** – we prepare analysis and can present monthly reports.
- **Accounting software** – we can recommend and deploy financial account software to suit your business needs.

An external CFO provides extensive benefits to your business

Cost-effective financial guidance

Not all businesses can afford (or need) a permanent in-house CFO. Partnering with us gives you access to our extensive experience and expertise, without the cost of a full-time CFO.

Improved relationships

We give you confidence in your numbers which can bolster your relationship with banking institutions, financiers, and key stakeholders.

Empowered planning

Our services help solidify your plans for sustainable growth.

Continuity of knowledge

An external CFO ensures no downtime is wasted on training new personnel.

Timely data

Our advisors have optional real-time access to your financial management software.

How our partnership works

We tailor our services to meet to your business needs so our timeframe is flexible. You can meet with your external CFO fortnightly, monthly or quarterly – it's up to you.

Client Case Study

SMW Group are a mining and industry service provider with a 300+ strong team of highly skilled tradespeople. We worked on-site to understand their frustrations with their existing financial management systems, which included:

- A belief that their system couldn't provide the information they required.
- Problems obtaining information on how projects were performing and their profitability.
- Significant fluctuations month-to-month in the reports, making it difficult for management to understand or project numbers.

Our results

Our Financial Management team concluded that the current system was actually capable of handling their requirements. It was more that the system wasn't being utilised to its greatest potential.

1. We helped reconfigure the system and provided education and training to key users. SMW quickly gained more meaningful data and powerful insights about their business.
2. With the introduction of regular board meetings and a budget, we helped to create the disciplines that SMW needed. This ensured that data relating to project profitability was discussed, and decisions could be made for the growth and success of the business.

Our flexible services with SMW

We worked as their external CFO for three years and then once the business gained confidence, they hired an internal CFO and Finance Manager. We continued to do their tax compliance and financial consultancy work, until we were appointed once again to perform CFO services.

Our services have now been extended again to include developing a financial dashboard for SMW. The dashboard solution gives management a visual snapshot of the key performance indicators, such as productivity, performance, and profits. It also provides real-time access to data – so they're able to influence the results at end-of-month. The goal is to make the dashboards mobile-enabled, so their key people can make smart business decisions with confidence, anywhere anytime.

Brisbane
Bundaberg
Fraser Coast
Gladstone

Business Advisors
Chartered Accountants
Wealth Managers

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



The information provided in this brochure is of a general nature only and is not considered advice. It has been prepared by Ulton without taking into account your personal financial situation or needs and should therefore not be relied upon. Information in this document provides a broad overview of current services and capabilities. Before making any decisions based on this information please seek detailed professional advice. To the extent allowed by law, neither Ulton nor any of its employees will be liable for any errors or omissions in the contents of this document, including errors or omissions due to negligence.

Liability limited by a scheme approved under Professional Standards Legislation.